

## Introduction

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## Aims etc.

### Aims of the class

- Give you an idea of qualitative methods as they are used in the social sciences
  - main processes or phases
  - an idea of
    - when to use them
    - their role in business studies
    - their specific features in business studies
  - if not an ability to use them, a cognitive model for getting deeper into literature

### Structure of these lectures

- The class proceeds in four parts with distinct identities
  - Introduction:
    - basics, some philosophy, research process, etc.
  - Producing observations:
    - the basics of data gathering
    - Obs! only the most important methods!

- Methodology/"inference":
  - analytic induction and its alternatives; reliability/validity, generalization
- Misc.
  - Ethics and confidentiality, writing qualitative research

## Situating Qualitative Methods

- Historically...
  - A good deal of scientific knowledge in business studies was based on qualitative methods until “logical positivism” became popular in the 1960s
  - Qual methods have become an accepted part of business studies again since the 1980s

- Qualitative methods
  - have come back to (business) economics since the 1980s after the dominance of abstract empiricism (C. Wright Mills)

- Why?
  - we are more international: cultures matter
  - we are more educated: try army-style management today... and you lose your workforce
  - organizational forms are richer than in the 1950s
  - consumers are increasingly more sophisticated
  - so is gov't regulation
  - (you can continue this list)

- In response, new techniques of organizing, marketing etc. are needed
- To understand economy, organizations, we need research methods that respect specificity rather than assume unity in human action (including economic action)
- Qualitative methods are one response to these changes

- Qualitative methods
  - open up many new areas for research
  - enrich quantitative research, prepare but also deepen it, help to criticize it and its assumptions
  - qualitative knowledge contributes to research anyway: it is good to know its procedures
- keep in mind: it is a very radical idea to say that only measurable things are real

## Introduction

## What “qualitative methods” mean?

- The difficulty in defining the concept
  - Demurrer: it is a practice, a skill; how to produce an abstraction from something that exists in action?

- But some common features exist:
  - studying individual cases/instances
  - from “emic” point of view, not using researchers’ categories
  - inductive rather than deductive process
  - preference for naturally occurring data

## Benefits of Being Qualitative

- The type of interest
  - lies in adding understanding of specificity, rather than producing general information
  - topic:
    - if you study the paper industry in Finland, you have three main players, and that’s it. Can you be quantitative?
    - Ecological effects: if you study Stora-Enso’s unions, they are not independent units, but belong to the same “population”

- Qualitative research often prepares quantitative research...
- ...but may as well be needed to learn about anomalies in statistical studies
- keep in mind that the aim of research is to add knowledge: good research typically does that regardless of methods!

## On “philosophy”

- Starting point: differences between explanatory approach and interpretive tradition
- Keep in mind that
  - philosophy of science is not empirical: it is talk about research, not an accurate description
  - the following is a gross abstraction (Easterby-Smith et al., p. 30)

|                                      | <b>Positivism</b>  | <b>Interpretive tradition</b>  |
|--------------------------------------|--|--|
| Researcher                           | Is independent from the object                             | is a part of the unit being studied  |
| Human interests (politics, economic) | As a rule ought not matter, are assumed not to matter      | An inevitable part of any research   |
| Explanations                         | Demonstrate causal relations between variables             | Add understanding about the object   |
| Progress in science                  | Through hypothesis, demonstration and counterdemonstration | Rich, carefully explicated data makes a set of “precedents” (as in common law) |

|                  | <b>Positivism</b>                                       | <b>Interpretive tradition</b>   |
|------------------|---|---|
| Concepts         | Are "operationalized" to be measurable                  | Articulate the "subjects" understandings; are based on lay notions            |
| Unit of analysis | Homogenous, typically small units                       | The unit can be "holistic," difficult to define. What is "management" anyway? |
| Generalization   | Statistically   | Theoretically   |
| Sampling         | Requires a large sample that is selected stochastically | Small sample selected on purpose to maximize information                      |

- Note
  - there are many strands in both traditions
  - still, take the table as a useful
    - diagnostic in analyzing presuppositions in your adopted scientific position
    - reminder that mixing odd elements usually leads to contradictions -- and bad grades

## Process

## Qualitative Research Process

- Early phases
  - initially the researcher just has a common interest
  - defining research problem: typically wider than in quantitative research, but not too much
  - *working with lay concepts!!!*

- Searching for theory the next step
  - reading, thinking, selecting perspective from the library: tying work into scientific traditions and debates
  - lay knowledge transforms into researchable problems and questions

## A note on "theory"

- Theories in the social sciences are not true or false, just better or worse
  - it is useful to distinguish unquestioned "perspective" from "hypotheses" that articulate competing theoretical perspectives
  - much like in economics: you don't question the notion of rationality, but can question individual theories
  - don't question everything -- or you end up giving up research

- “Producing Observations”

- systematic data gathering begins
- initially cautiously, data still feeds imagination
  - it is good to *forget theory* at this stage
  - hypothesis emerge gradually, and are organized even more gradually
  - also, new questions emerge in field work

- Later in field work...

- you start to test these hypotheses consciously
- a good deal of qualitative research in fact consists of hypothesis testing, *but this takes place late in the research process*
- it is crucial to give data a chance to shape one's thinking, *not just* to confirm or refute one's theoretical explanations (=hypothesis)

- Writing

- early phases may be easier in qualitative than quantitative research but...
- qualitative research takes typically more time to write down

## The Sample Perspective

## Fact or Sample?

- Pertti Alasuutari made a distinction between two ways of treating data
  - as facts - documents of something outside data
  - as sample - something that is interesting as such

## Fact(ist) understanding

- This is the traditional way of treating data
  - the assumption is that there is something out there ...which your data is supposed to represent (more or less accurately)
    - in designing your study, you concentrate on making sure that there are as few biases as possible

## Sample perspective

- Here, some piece of data is interesting as such
  - analysis concentrates on that piece of data... without any attempt to guarantee see whether it describes something else accurately
  - that is, data is a sample of something - culture, meaning structure, whatever

## Differences and implications

- Understanding the nature of data
- working style in both data gathering and analysis

- methodic implications are dramatic
  - what is good research? Criteria for a successful study are dramatically different:
    - In factist perspective, it is the quality of data, accuracy of description, and possibly theoretical explanation based on description
    - in sample thinking, it is the quality of explication of data: whether you find something new

## Example

- narrative analysis...
- discourse studies...
- studying culture...

## Reactivity: a useful concept

### “Reactivity”: A Useful Concept

- Reactivity = the researcher’s effects on people, organization studied
  - in business studies, “the Hawthorne effect”
  - in the natural sciences, “contamination”
    - “Donald Roy’s fiasco”; Peter Kong-Ming New’s and Maurice Leznoff’s stories

– things that add reactivity

- situational: organization politics, quarrels, antagonistic worker-management relations
- sensitive research questions: politics, unfair business practices, sexuality ...
- researcher's activities: ought to be transparent for people studied

• Managing reactivity

- cautiousness in early phases of research
- common sense test
- planning communication about research

## Research Design

## Two observations

- “Research design” in qualitative research is simpler than in experimental work
  - typical selection variables:
    - time frame, comparative cases, methods (possibly several methods)

• Practical aims add complexity

- action research, benchmarking, organization development, constructive research

## Planning

## Planning Qualitative Research

- When planning qualitative research
  - ...you should think about everything I talk about in this class
  - after selecting a topic, the rest is just thinking and planning: this class gives tools for that

- Writing winning proposals...
  - follow normal practice in research planning: stress on problem, contribution (&literature), methods (data gathering, inference), schedule, budget, ethics, etc.

- however, pay particular attention to explaining
  - qualitative method and its benefits, if it is uncommon to future reviewers
  - explain how you aim to generate hypothesis, not test existing theory
- if there is one principle, it is: explain in more detail everything that is uncommon in your research community

- Practical tips:
  - Reserve lots of time for writing
  - *Make* research plan into a tool: write and rewrite it, discuss it, go to conferences to get different viewpoints – that is ultimately the only way to learn that you have written!

questions?

### Sources

#### General

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