Of methods and methodology

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Abstract

Purpose – The purpose of this paper is to explore what the term “methodology” might be taken to mean. It uses an aphorism by Howard Becker as a springboard for examining the nature of methodology, arguing that Becker’s view of methodology was misleading.

Design/methodology/approach – There are two components. First, “insider” account of research findings concerning the nature of mixed methods research is presented. These findings derive from a content analysis of articles based on mixed methods research and from interviews with mixed methods researchers. Second, the paper examines the paradox that qualitative research is often viewed as generating interesting findings but that qualitative researchers frequently feel that they experience difficulty in placing qualitative articles in mainstream journals.

Findings – The findings from the mixed methods study demonstrate that mixed methods research is often rationalized in a different way from how it is actually employed.

Research limitations/implications – The second part of the paper should be extended so that a more comprehensive analysis of publication patterns can be carried out.

Originality/value – There are relatively few examinations of what we mean by “methodology.” The paper tries to move these considerations forward by arguing that methodology is about the examination of “methodic practice.”

Keywords Research methods, Qualitative research

In this paper, I aim to outline what I think “methodology” is about and I do this by examining initially a mischievous remark made by a leading social scientist – Howard Becker – over 30 years ago and by providing a précis of some research I have carried out on the nature of mixed methods research and its underlying practices. I will use these findings as a case study of what I think methodology is and should be about. I also take a further instance, namely, the tendency for qualitative research to be regarded as producing interesting insightful findings but for qualitative researchers to experience difficulty in publishing their material in mainstream journals. I then reflect on the implications of these explorations around the concept of methodology.

These musings are based on an inaugural professorial lecture. This is an occasion when (in the UK at least) the speaker is, by dint of the nature of the occasion, invited (some might say expected) to approach his/her subject matter in an expansive way. For this lecture, I could have simply presented some of my key findings and drawn

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some basic inferences from them, but the occasion calls for more – or at least that was my perception. Thus, while many of the findings relating to mixed methods research that are discussed here have been presented elsewhere (Bryman, 2006, 2007, 2008a), the context in which I am situating them is different.

Indeed, social scientists often display considerable ambivalence about issues to do with research methods and methodology. The much admired American sociologist Becker (1977, p. 3) once opened one of his essays with the provocative line “Methodology is too important to be left to methodologists.” He immediately went on to acknowledge that this was, as he put it, a “trite paraphrase of a cliché” but the damage was done. You cannot backtrack when you open an essay with a comment like that. But Becker had an interesting point that I want to use as a springboard for a discussion of the nature of methodology.

But before that, what do we mean by terms like methods and methodology? By “methods” we typically mean the techniques that researchers employ for practising their craft. “Methods” might be instruments of data collection like questionnaires, interviews or observation; they might refer to the tools used for analysing data, which might be statistical techniques or extracting themes from unstructured data; or the term might refer to aspects of the research process like sampling. Methodology is the study of the methods that are employed. It is concerned with uncovering the practices and assumptions of those who use methods of different kinds. However, practices and assumptions are somewhat different matters and the emphasis among those writers who contributed to discussions about the “paradigm wars” (Bryman, 2008b), as they are often called, was largely on the assumptions rather than on the practices.

Becker’s point was that in sociology, those who proclaim that they are methodologists tend to be advocates of particular methods. Their role is one of telling researchers what they should, and just as importantly, should not be doing. He depicted methodology as a field where there is a tendency to preach the right way to do research and in the process to convert others to methodologists’ beliefs about how research should be done. In other words, Becker saw methodologists as students of methods who have an axe to grind – they have seen the light in terms of what method or methods provide the best data for the social researcher and want to draw others into their insight.

But, Becker then observed, when we examine the kinds of methods that methodologists advocate, we can discern a common pattern to them – they all relate to quantitative methods. They are methods for generating findings that are deemed to be valid and reliable; methods that entail controlling the contaminating effects of variability in the procedures that social researchers employ. Thus, Becker depicted methodologists as writers who promoted refinements to methods associated with experiments, surveys, and statistical techniques. They acted as what might be referred to nowadays as product champions of these techniques. As a result of these tendencies, Becker argued that certain methods tend to be neglected. Although, Becker only hinted at this point, qualitative methods tend to be especially sidelined by methodologists in his view. This includes approaches to data collection using participant observation, semi-structured interviewing, and case studies. As a result, according to Becker, social research is not well served by methodologists – how could it be if its practitioners ignore methods that are very much part of the social researcher’s toolkit? It is this neglect of a broad swathe of methods that contributed to his assertion that methodology is too important to be left to methodologists.
A personal reflection
When I began teaching research methods at undergraduate level in the 1970s, the emphasis on quantitative research Becker identified was the general framework within which the subject was couched but a change was also afoot. Specifically, there was a growing movement championing the use of qualitative research methods. This movement was and is significant for two reasons. Firstly, it made research methods as an area of both teaching and research considerably more interesting, not least because it introduced an element of controversy into the field. The second and related factor was that there was a growing recognition of the significance of philosophical considerations for methodological issues and concerns. In particular, it was being suggested that the scientific method associated with the philosophical position known as positivism was ill-suited to the study of humans and their societies. Instead, advocates of qualitative research argued that an approach is needed that better reflects the uniqueness of humans compared to the subject matter of the sciences. In order to support their claims, many of the writers adopting this stance drew upon various philosophical positions that were antithetical to a reliance on the scientific method.

That development changed the landscape of research methodology. It brought qualitative research much more to the fore. Texts were written in which the qualitative approach played a much larger role than in books like Goode and Hatt (1952) and specialized texts also began to appear. The significance of this change in the landscape does not reside solely in the fact that qualitative methods became more prominent than previously, but that matters of method became entwined with matters of philosophy. In other words, choices of how to do research were increasingly seen as not just a simple matter of making a technical decision about the most appropriate way to collect data. Choices about method were also increasingly seen as to do with commitments to philosophical positions, especially commitments to positions like positivism that reflected the scientific method as conceived by Goode and Hatt or to positions that were hostile to positivism. In other words, choosing to employ a questionnaire for many writers was no longer seen as just a matter of making a technical decision based on one's professional expertise; it also expressed an allegiance to where researchers positioned themselves in philosophical terms. Methods became as much to do with philosophical choices as technical ones. These reflections on the epistemological foundations of different research strategies is very much in tune with a notion of methodology as the analysis of the assumptions that lie behind the methods employed within a discipline, which is rather different from Becker’s notion of what methodology was about. As previously suggested, however, methodology is also about the examination of the research practices of a discipline's practitioners.

Research on mixed methods research
In the academic year 2003-2004, I worked full-time on a research fellowship to examine the state of mixed methods research. The fellowship was funded from the ESRC’s Research Methods Programme. There were two main facets to this research. First, I felt it was important to know something about the nature of mixed methods research: which research methods and research designs tend to be mixed? Does the quantitative component tend to have priority over the qualitative one (as is commonly supposed) or vice versa? Are they really mixed at all? What are the reasons given for doing mixed methods research? The second facet was that I was interested in the contingencies of
doing mixed methods research – problems encountered, issues in mixed methods research that need to be resolved, perceptions of its advantages, etc. The first of these was concerned with revealing the public face of mixed methods research; the second with the experiences of mixed methods researchers in their own terms. That both facets of mixed methods research needed to be addressed was suggested by Gilbert and Mulkay’s (1984) important study of researchers working in a scientific field in which a disjuncture was demonstrated between the account of scientific procedures implicit in journal articles and how they talked about their practices. For the first of the two research objectives, a traditional quantitative content analysis of published journal articles was conducted. The sample of articles related to the period 1994-2004 and were sampled to provide insights into five disciplines: sociology; social psychology; management and organizational research; media and cultural studies; and human geography. For the second facet of the investigation, semi-structured interviews were carried out with 20 practising mixed methods researchers. These researchers represent a purposive sample. Many of the interviewees were identified in the course of the content analysis of articles referred to above. The rest were selected as a result of their known contribution to discussions of mixed methods research. Their disciplines were the same as the five fields represented in the content analysis.

Content analysis findings
In presenting a small sample of the findings from the content analysis (Bryman, 2006), I want to emphasize what was for me a major issue – the rationales researchers gave for combining quantitative and qualitative research. In other words, why do some researchers say that they want to combine the two approaches? To do this, I employed two classifications of rationale. One is the well-known classification of five rationales for doing mixed methods research developed by Greene et al. (1989). Originally developed in the context of evaluation research, this classification has been used in other contexts (Niglas, 2004). In addition, I developed my own classification of ways of combining quantitative and qualitative research. I applied this scheme to each article. I called this the “rationale” for using mixed methods research. I used exactly the same classification to examine the actual practices of these researchers. In other words, how did they actually use the two approaches together, which I called practice? This classified authors’ accounts of what they felt had been gleaned from combining quantitative and qualitative research and any ways in which the two were combined which could be inferred from authors’ accounts. So, I worked with a distinction that I called “rationale” and “practice.” I did this because I had a hunch that authors’ accounts of why they intended to combine quantitative and qualitative research might differ from how they actually combined them in practice. The distinction between rationale and practice was applied to both the Greene et al. (1989) and my own scheme.

What follows are some of the more interesting findings from the content analysis (Bryman, 2006, 2008a). Quite often no rationale for using a mixed methods approach is given. This occurred in 27 percent of the articles submitted to the content analysis. That in itself is interesting because it could be taken to mean that combining quantitative and qualitative research has become something that does not warrant a special discussion. This would imply that mixed methods research has become so integral to the practices of social scientists, the case for employing it does not require special mention. On the other hand, it could be argued that given the greater cost and
time involved in doing such research, there is a strong case for providing a clear rationale. Certainly, textbooks concerned with methodological issues stipulate that it is conventional practice to explain how the methods we use link to the research questions we are asking. When rationales were specified, it was not always apparent that that was how the two elements had actually been used. In other words, authors would justify their use of quantitative and qualitative research in a particular way, but in terms of actual practice, they often combined the two approaches in a distinctly different way. The same point can be made the other way around. When we look at practice, there was a tendency for quantitative and qualitative research to be combined in ways that would not have been expected from an examination of the rationales.

In fact, when we compare rationale and practice, researchers typically found more uses for combining quantitative and qualitative research than we would have expected based on the number of rationales they specified. This suggests that authors often find uses for or outcomes of combining quantitative and qualitative research that they had not intended at the outset of their investigations. A particular instance of this concerns triangulation. This is a term that has been taken from trigonometry and thoroughly adapted, some would say distorted (Blaikie, 1991), to refer to the process of checking on the validity of a set of findings from one method by comparing it with findings from another method. In the case of mixed methods research, the researcher might put quantitative and qualitative findings side-by-side to check how congruent they are. While, 13 percent of the articles gave triangulation as a rationale, 35 percent used it in practice. What this seems to suggest is that although triangulation may not always be a rationale for combining quantitative and qualitative research, when faced with the two sets of data, some researchers find it hard to resist making allusions to the consistency or otherwise of their quantitative and qualitative findings.

One approach revealed by the content analysis was that a minority of articles employed what might be called a Gatling gun approach to rationale and practice. In terms of rationale, six articles were found to employ four or more rationales; in terms of practice, 33 articles (14.2 percent of the sample) mentioned four or more rationales. The highest number was seven in terms of both rationale and practice. The Gatling gun approach justifies the use of mixed methods research by listing of a variety of possible reasons for adopting it.

These findings suggest that there is quite often a mismatch between the rationale for combining quantitative and qualitative research and how it is used in practice. Does it matter that typically mixed methods researchers derive a wider range of outcomes from combining quantitative and qualitative research than the findings concerned with rationales would lead one to expect? It may be that this arises because the products of mixed methods research are often not predictable. In fact, they may be rarely predictable. When the two sets of data are viewed in relation to each other, new possible ways of thinking about the connections between them might come to mind. When the quantitative and qualitative components are put side by side, interesting but unanticipated insights may be thrown up. This can be illustrated with Hammond’s (2005) discussion of a mixed methods project, whereby a qualitative study of the benefits of lifelong learning preceded a quantitative one. Although, the two investigations were not envisaged at the outset as constituting a mixed methods project, when the two sets of findings were put together some unanticipated points at which the data were mutually illuminating were uncovered. On the other hand, my study’s findings also point to the
possibility that the grounds for doing mixed methods research are not always being thought through as fully as they might and perhaps should be.

Semi-structured interview findings
The second major strand of the research that is relevant to this discussion is that I conducted semi-structured interviews with 20 social scientists whom I knew to have employed mixed methods research at some point in their work. The goal of the content analysis was to map the general characteristics of mixed methods research in terms of a variety of features. With the semi-structured interviews, the intention was to glean the perspectives of mixed methods researchers in their own terms. I wanted to understand from the perspective of practitioners how they thought about mixed methods research, the contingencies involved in doing such research, their impressions of the state of this approach, and so on. Thus, the content analysis was designed to give a sense of the public face of mixed methods research, while the interviews were an attempt to get inside the heads of its practitioners in order to tease out how and why they used mixed methods research and their reflections on their own and others’ practices.

One issue to come out of these interviews is that some of the researchers felt that mixed methods research had become fashionable and that this was not necessarily a positive development. In particular, it was felt that the tendency for the approach to become fashionable might mean that some researchers were drawn into employing it when it is not necessarily appropriate. In other words, they seemed to be saying that mixed methods research is sometimes being undertaken with insufficient thought to the reasons for adopting it rather than a single method approach. Such a finding is consistent with my content analysis findings. Several interviewees felt that increasingly mixed methods research was expected in various quarters (in particular, by funding bodies) and by and large they felt this was not a good development. While they themselves were often enthusiastic about mixed methods research, the notion that it was being employed because it was believed to be more likely to be favoured was a concern for many of them.

What is striking and interesting about these comments is that they imply that some researchers are perceived as engaging in mixed methods research not so much because of its appropriateness for research objectives, which is how the textbooks convey the research process, but because it is seen as more attractive in certain quarters. What all of this implies is that in stark contrast to the situation back in the 1980s when I first got interested in this area, mixed methods research has become fashionable. It is perceived to be a desirable approach in its own right.

A further issue that came out of the interviews was that many mixed methods researchers feel that they experienced problems with integrating their quantitative and qualitative findings and that this is a common problem for practitioners. Between them, they helpfully identified a set of barriers that hinder integration (Bryman, 2007). For example, when mixed methods research is conducted in teams with quantitative and qualitative specialists, they can sometimes work separately on their data and end up making insufficient reference to each other’s findings. This tendency can be exacerbated by another barrier that was identified, namely, that the timelines for doing quantitative and qualitative research may often go out of kilter with each other. Thus, if, for example, the quantitative findings were forthcoming before the qualitative ones, those researchers who had developed the quantitative findings may agitate to get their
findings published as soon as possible given the highly competitive labour market and the implications of publications for academic careers. The real and perceived publication policies and prejudices of journals and their editors also mattered. For example, if a journal was perceived or known to prefer articles with a strong quantitative basis, the qualitative data would often have less influence in the article and this would work against any integration of the two sets of findings. This recalls Sutton’s (1997) confessions about being a closet qualitative researcher, when he observed that his qualitative data and their impact on his inferences were often implicit. The qualitative data often helped him to understand his quantitative findings but equally the preferences of many journal editors discouraged him from making a great deal of the qualitative findings. I will return to the issue of publication below.

These findings from the interviews were helpful. In the course of doing the content analysis, I had come to the conclusion that they revealed a tendency for mixed methods researchers not to mix their findings. Only 18 percent of articles genuinely integrated the quantitative and the qualitative findings. In nearly half of the articles, there was more or less a parallel presentation of the two sets of findings. The problem with a finding like this is that what constitutes genuine mixing or integration is a somewhat subjective judgment, although other researchers who have examined mixed methods studies have arrived at surprisingly similar conclusions (see an investigation of mixed methods research in education (Niglas, 2004) and an investigation of mixed methods research in the health field (O’Cathain et al., 2007). The interview findings were significant for an appreciation of the issue of integration in that they not only suggested that practitioners recognised that there may be a problem, so that it was possible to triangulate the rather subjective quantitative findings, but also interviewees were able to identify some of the reasons for the difficulty of integrating them. In a later study of social policy researchers, it was noted that whether integration takes place in a mixed methods study should be regarded as a criterion of quality (Bryman et al., 2008).

Methodology and publication

In the discussion so far, which is based on my own research on mixed methods research, I have presented what I view as one of the main areas that methodology should be about — teasing out the nature of our practices, regardless of whether this is done by examining written research reports or by interviewing practitioners. Ideally, we need both, as Gilbert and Mulkay’s (1984) study of scientists revealed, and undoubtedly other possible modes of enquiry might be envisaged. Yet another aspect of methodology as I have tried to present it is to examine the assumptions that lie behind what we do. That is what the period of the paradigm wars entailed. It involved the identification (and in many cases, the critique) by qualitative researchers of the assumptions and foundations of quantitative research and the outlining of an alternative set of assumptions for qualitative research.

In the discussion of some of the impediments to integration that were discerned in my interviews with mixed methods researchers, I noted that one of the reasons for a lack of integration was journal editors’ and journals’ perceived bias against a great deal of qualitative research. This is itself an intriguing topic in terms of the notion of methodology being developed in this paper. The reason why it is intriguing is that frequently social scientists of diverse persuasions are impressed with particular qualitative studies. In the paper in which Becker (1977, p. 6) made his remark about
methodologists he noticed an interesting phenomenon: while methodologists tend to focus on proselytizing on behalf of quantitative methods, when we look at the books that had won major awards in the years before he was writing, they entailed the use of methods “our most honored methodologists have spent little time on.” This included some studies in which qualitative research figured strongly. Becker was writing about sociology but the same or at least a very similar phenomenon has been observed in organizational research. When Frost and Stablein (1992, p. 6) asked a panel of organizational research scholars to nominate “one or more articles … during the 1980s that were examples of outstanding research method and design in the field of organization studies,” four of the seven exemplars that were selected were either exclusively qualitative studies or mixed methods ones in which qualitative research figured strongly. Similarly and more recently than either of these exercises, Bartunek et al. (2006, p. 11) asked Academy of Management Journal board members to nominate up to three empirical articles concerned with management published in the preceding 100 years “that they regarded as particularly interesting.” Only two articles received more than three nominations and in both of these the articles were based more or less exclusively on qualitative data and findings. Of the 15 articles receiving two or three nominations, nine were either exclusively qualitative studies or mixed methods ones in which qualitative research figured strongly.

If we examine the reasons given by the board members for rating an article as “most interesting”, characteristics cited like being counterintuitive, good writing and new theory are areas where articles based on qualitative research are especially likely to be strong. The first of these characteristics is consistent with Davis’s (1971) observation that social scientific work is more likely to be regarded as interesting if it disagrees with some of its audience’s assumptions.

These three exercises – Becker’s, Frost and Stablein’s and that of Bartunek et al. – are illuminating because, from the point of view of the notion of methodology that I am developing in this paper, it raises the interesting question: why did some of the mixed methods researchers I interviewed feel that one of the reasons for the lack of integration of quantitative and qualitative findings was to do with the perceived publication preferences of mainstream journals in particular? In large part, this reflects the fact that qualitative researchers often feel that such journals are difficult for them to publish in. For example, Guba (1996, p. 46) has written of his worry that in encouraging colleagues and students to flirt with qualitative research he might be “making it difficult for them to get jobs, to be published, or to be promoted or tenured in the face of the hegemony still enjoyed by adherents of positivism” (emphasis added).

These reflections are significant for the broader vision for methodology that I am seeking to develop here in that it invites us to consider the habits of researchers, but in the context of the wider communities of practice within which they operate. In the case of the issue of publication in journals, the interesting methodological question is – why does there appear to be resistance to publishing qualitative findings in mainstream journals, even though work deriving from qualitative research is often seen as outstanding or as interesting? There are several possible reasons for this state of affairs. It could be that the perceived need for articles to conform to certain conventions in terms of both research process and format is typically seen as being the over-riding factor and that qualitative research needs to exhibit very arresting findings for it to be accepted.
Conclusion: back to Becker

In concluding, I would like to go back to Howard Becker’s mischievous comment about methodology being too important to be left to methodologists. I am not concerned especially about the validity of Becker’s remark. More significant is his suggestion that methodologists are proselytizers (Becker (1977, p. 4) referred to methodology as a “proselytizing specialty”) who seek to convert the research community to their favoured method or technique. As I have tried to suggest, that is not what I take methodology to be about. It is concerned fundamentally with the nature of what I would call methodic practice. That is, it is concerned with revealing in a systematic manner the practices of researchers and the ideas and presuppositions that lie behind those practices. It is not a springboard for converting non-believers to a cherished method, as Becker implied. As such, methodology is more neutral in its implications and manifestations but no less interesting or significant for that. It does after all challenge us to think about what we are doing when we engage in research and to lay bare the assumptions of our practices. In this paper, I have outlined two areas that illustrate this notion of methodology. I show how a detailed examination of the methodic practices of mixed methods researchers was undertaken and what lessons might be learned from such an exercise. In particular, this research shows that the ways in which mixed methods research is apparently intended to be used is not clearly related to the ways in which it is actually employed. This finding implies that researchers need to give greater consideration to their reasons for conducting mixed methods research and whether they are using it to its full potential. Further, the research demonstrates that mixed methods research is not always mixed to the extent that is desirable and that there is a need for greater reflection on the knowledge yield from mixed methods research. Also, I have suggested that the identification of an apparent irony in the behaviour of researchers concerning attitudes to publishing qualitative research can be used as a springboard for exploring the values underlying methodic practices. It is issues such as these that I see as the subject matter of methodology, not the conversion of social and organizational researchers to cherished techniques.

References


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