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Mixed Methods? Do They Really Work? A Commentary

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Abstract

In this short commentary, I comment on the state and popularity of mixed methods in social sciences in recent decades. While quantitative and qualitative methods are considered complementary, I question the use of mixed methods by scholars without deeper reflections on the epistemological and methodological foundations of these two methods. My contention is that researchers cannot simply combine qualitative and quantitative methods without explicating how they reconcile and negotiate their different foundations. These two methods are not just tools. The act of mixing them without reflections is simply not sufficient. Reconciling and reflecting upon the foundational differences between these two methods would be an essential step.

Keywords: mixed methods, qualitative method, quantitative method, epistemology, reflexivity

¿Métodos mixtos? ¿Realmente funcionan? Un comentario

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Resumen

En este artículo llevo a cabo un comentario del estado y popularidad de los métodos mixtos en ciencias sociales en décadas recientes. Mientras los métodos cuantitativos y cualitativos se consideran complementarios, cuestiono el uso que personas académicas e investigadoras hacen de los métodos mixtos sin reflexionar en profundidad sobre los fundamentos metodológicos y epistemológicos de esos dos métodos. En mi opinión, los investigadores e investigadoras no pueden simplemente combinar los métodos cualitativos y cuantitativos sin explicar cómo negocian y reconcilian sus diferentes fundamentos. Estos dos métodos no son sólo herramientas. El acto de combinarlos sin reflexión es simplemente insuficiente. Reconciliar y reflexionar sobre las diferencias fundacionales entre estos dos métodos sería un paso esencial.

Palabras clave: métodos mixtos, método cualitativo, método cuantitativo, epistemología, reflexividad

In the past two decades, there has been an increasing trend of using mixed methods among researchers in social sciences. Supporters point out that mixed methods can provide different answers to our inquiry. It is argued that, to understand the larger-scale social pattern and the question of “what,” the quantitative method would be most effective. The qualitative method, confined to limited localities and subjects, can be used to understand the subjectivity of actors and questions of “why” and “how.” It is further stated that, since quantitative data is generalizable while qualitative data is not, these two methods are complementary. Combining these two methods can generate the most comprehensive results.

The trend toward combining both methods seems to deviate from feminist scholars’ critiques of quantitative methods, positivism, and scientific paradigm since the second wave women’s movement (Devault, 1999; Harding, 1986, 1991; Hesse-Beber & Yaiser, 2004). They point out that science is not neutral. It emerges under particular historical, social, and cultural contexts. Science is embedded with gender, racial, and cultural ideologies. Racial minority scholars have also made similar arguments through examining how science is developed under the context of racism and imperialism during the 19th century (Zuberi & Bonilla-Silvia, 2008).

Social scientists are located within particular social and cultural contexts. As feminist standpoint theorists (Harding, 2003) argue, researchers’ positionality and identities shape their research, including the selection of topic, the theoretical framework, the methodological approach, and the interpretation of data, etc. Feminist scholars point out that social research treats male as the universal subject and generalizes men’s experiences to women. This epistemological and methodological bias ignores women’s experiences. Since 1970s, feminist scholars focus on women, mostly using qualitative methods. They emphasize the importance of recognizing researchers’ identities, power differentials between researchers and research subjects, the voice of research subjects, partial and multiple truths, representation, and reflexivity (Alvesson & Skoldberg, 2009; Coffey, 1999; Gitlin, 1994; Hertz, 1997; Lather 2007). Qualitative methods are considered the appropriate approach to understand the subjectivity of women.

In the following, I first discuss the institutionalization of quantitative methods and the impact on our research and teaching. I then use my own research to examine the uncertainty and fluidity of research to problematize

the static and fixed categories in quantitative methods, which do not reflect the messiness in actual research process. With examples from my research, I demonstrate that mixing these two methods may not be as simple as supported have argued.

Institutionalization and the Disciplinary Emphasis on Quantification

While qualitative research has gained recognition and changed the methodological landscape in sociology over the past three decades, qualitative methods are still deemed less prestigious, rigorous, objective, and scientific. Criticisms include that it is too subjective, not rigorous enough, and not objective enough. It lacks generalizability and representativeness. This disciplinary emphasis on the legitimacy of quantitative methods influences not only junior and/or senior sociologists' methodological choices but also master and doctoral students' preferences. For students who are in the job market, quantitative skills meet the market demand. With the disciplinary emphasis and job market demands, students tend to choose quantitative methods as the main skill they would like to pursue. Further, with the pressure of tenure, junior scholars might also use quantitative research to claim the legitimacy of their research. This institutional emphasis on quantitative research dictates a less recognized position of qualitative methods in social sciences disciplines.

The institutionalization of quantitative methods in the curriculum paves the initial path toward the dominance of quantitative research. The institutionalization of research methodology determines the standardization of curriculum. Since I am in sociology, I will speak to the discipline more generally. I do not intend to generalize my analysis to all programs for many programs have experienced changes in the past decade. It is the institutionalization of curriculum that I am addressing to. For many sociology programs, at least in my program, there are two levels of graduate courses on methodology. First level is an introductory course on general social science research methods. The second level is a qualitative methods course and several quantitative methods courses, such as advanced statistics, data analysis, and regression, etc. Students can choose one or both

approaches. Students' choices and preferences are often shaped by disciplinary dominant approach and job market demands.

The teaching of introductory courses and the choice of textbooks further solidify the position of quantitative methods. Most introductory textbooks are usually written from the quantitative orientation and positivistic paradigm. Therefore, students are exposed to an epistemology and methodology rooted in positivism, with specific language, discourse, and lenses. Students are taught to think in terms of variables, hypothesis, objectivity, generalizability, and representativeness. They are taught that researchers should be and can be objective as well as detached. In this type of introductory courses, qualitative method is presented as an add-on approach and deemed less important. Research methods also tend to be presented as techniques and formula. They are taught to master tools rather than understanding their epistemological foundations. The way instructors teach and how the textbooks are written thus frame students' thinking about research methodology and about doing research in general.

The institutionalization of quantification and the standardization of curriculum make it difficult for me to teach qualitative methods. Students come to class expecting to learn skills as opposed to the intellectual and epistemological foundation of both methods. I start my class with critiquing scientific paradigm and positivism and presenting various paradigms in social science research. I want to emphasize that all research methods are value-laden. I discuss the historical, structural, and cultural contexts within which quantitative methods become dominant in American sociology, such as the establishment of foundations and funding agencies as well as the bureaucratization of government agencies, etc. Second, I want students to think of methods as contextualized and historicized. I bring out issues that are central to feminist scholarship, e.g., the unequal power relationship between the researcher and the research subject, the influence of the social location and identity of the researcher, subjectivity, reflexivity, exploitation, voices of subjects, and researcher's authority in interpretation and writing.

For example, one issue I always ask students to reflect upon is that of exploitation. I believe that there is always the element of exploitation embedded in doing qualitative research. We as researchers have to think about how our research might exploit our research subjects. We have to ask the following questions. Why is it always the underprivileged that is being

studied? What does it mean when researchers can simply go into a community, take information, leave, and often give nothing in return? What are the implications that researchers have the power to include/exclude certain data, interpret data from their particular lens, and write the text with authority and legitimacy recognized by the academia instead of research subjects? What does it mean that research subjects do not have a voice in the production of knowledge? These are all important questions for students to consider and struggle with constantly when they embark on the research journey, regardless the method they choose. However, students often do not appreciate all the fundamental knowledge on epistemology and methodology. Students tend to resist my teaching approach and my presentation on alternative theoretical paradigms. Since all this information does not have enough market value, they do not understand why they have to learn it. They want skills rather than abstract knowledge. However, skills for qualitative research require more long term practices. Further, possessing skills does not necessarily mean that one is capable of doing good research. The institutionalization and standardization reproduce the dominant paradigm and makes it difficult to teach alternative paradigms and transform the discipline through education.

Standpoint from the Start: Why Do You Study the “Other”?

My first research project is about Filipina domestics in Taiwan. My current project is on Polish immigrant women domestics in Chicago. Whenever I discuss my research with people I meet in conferences or approach research subjects for interviews, they always ask me why I am interested in the topic. I feel defensive at times. This question can be interpreted in several ways. Why am I interested in studying a group of people with whom I share no commonalities or connections? While Filipinas and I are both Asian women, we are of different nationalities and races. They work as domestics in Taiwan while I am a doctoral student in the United States at the time. Similarly, I share no ethnic, racial, and national commonalities with Polish immigrant women. Their status as domestics differs from mine as an academic. The only connection I have with these two groups of women would be our nomadic status so to speak. I have been in the United States for

over twenty years. I am not an American or Asian American culturally and legally. I am no longer a Chinese either, culturally speaking. I am occupying an in-between space in a foreign land.

Implicitly, this is also the epistemological question of how I truly understand their experiences if I have never been a domestic. While I might understand them as an (im)migrant woman, how do I fully grasp their work experiences if I have always enjoyed a middle-class lifestyle, occupy a privileged academic position, and never work as a domestic? How do I claim authority and legitimacy as a researcher? My legitimacy as a researcher is in fact challenged by a Filipina woman during my fieldwork 15 years ago. She asks me how I could understand her experiences if I never worked as a domestic. Her questioning raises the issue of whether we need to be an insider in order to produce legitimate knowledge. Does an insider automatically have a privileged perspective? Does an outsider have no claim to authority and legitimacy of knowledge production?

Another way to interpret the question is the expectation that we, as a racial/ethnic minority member, should only study our own people. While it can be true that our intellectual interest is tied to our various identities, this tie may not always be true or should be automatically presumed. This expectation assumes that we have no interests beyond our community or our identities. Or it is expected that we have responsibility and obligation to our people and that we should give back through our research. Yet this expectation is usually not applied to white scholars.

Another ramification is that I give different answers to different audiences. For academic audience, I discuss the importance of examining power differentials between two women and asking what this inequality means for feminist politics. For my research subjects, I am careful about what I say. I have to maintain neutrality at times. With employers, I don't mention anything related to feminist politics and power inequality. I simply state that I try to understand their perspectives, such as reasons for hiring a domestic and their management practices. For domestics, I state that I know the work they do is difficult and they are treated badly by employers at times. I tell them I want to know more about their experiences and I sympathize with them. Neither one of the above answers describes the whole picture of my research. This raises the question of whether withholding information is ethical. Are we exploiting subjects when we withhold

information? Or does the end justify the means? This discussion is to demonstrate that why we do certain research is value-laden. Our identities and politics shape our research right from the start, i.e., the choice of topic.

Facing Aliens: Maneuvering Power, Commonality, and Differences

In the following, I use my experiences to show how we have to maneuver power, commonality, and differences throughout the research process. Doing research is not a fixed and stable process. Rather, it is shifting and fluid, thus consistently shaping our project. While we carry a particular research agenda, the contour of our research shifts because of our interviews with research subjects and of our observations. Our preconceived assumptions would be challenged because we gain deeper understanding of the community under study. Our presumed “authoritative” status as scholars could be shaken because our research subjects talk back and question our claim to the legitimacy of research results and our authority in knowledge production. Further, researchers’ and research subjects’ multiple identities are intersectional and interactive and thus produce complex dynamics. These intricacies in qualitative research cannot be captured through number or categories. That is, do categorical and neatly demarcated variables and fixed numbers truly give a picture of the social world under study? How might we handle the complexity, uncertainty, and fluidity of research process?

Imposition of Victimhood on “Vulnerable” Subjects

Let me start with my progression as a novice researcher and the importance of reflexivity to my intellectual maturity. I started out my research on Filipina domestics in Asia 15 years ago as a fellow for a human rights organization. I just obtained my Master’s degree. As a feminist, I was concerned about the human rights violations against migrant live-in domestics. I believed, as researchers, we should be committed to social justice through research. My expectation for myself was to be an activist scholar. After reading reports of violence against these women, I set out to explore their experiences of abuse and exploitation. The questions I framed were highly influenced by my perceptions of these women as victims. I

focused on what their employers “did” to them. I didn’t ask what they “did” to respond.

I finally realized that my approach was problematic when I interviewed a Sri Lankan woman. I asked her why she came to the shelter. She explained that her employers only paid her one third of the wage for three months. They forced her to sign a document stating that she was paid the full amount. Afraid of losing her job, she signed each time. After three months, she finally stood up to her employers and told them that she would not sign. They threatened to deport her back to Sri Lanka. Instead of signing her name, she signed the actual amount she received on the document. This strategy enabled her to win her case in court. Her employers were ordered to pay the lost wage for the first three months and she was allowed to continue to work in Hong Kong.

After this interview, I came to the realization that I missed out a rather central aspect of their experiences, i.e., their practices of resistance. Live-in domestics, due to their vulnerable position, often have to adopt creative, subtle, and less confrontational strategies, as the above example demonstrates. Unless we have conceptualized alternative definitions of resistance, we can often miss out what resistance means to women and the limited strategies available to them under their circumstances. Because of this realization, I had to reshape my research direction to include a more complete picture of their lives.

While it might be commendable that I wanted to address abuse and exploitation, I also essentialized these women simply as victims and put them in the pedestal of victimhood. I essentially carried an attitude that I had to “save” them and I viewed them as passive and helpless. This example demonstrates the fluidity of research process, as I point out earlier. We as researchers can be vulnerable to our own blind spots and preconceived assumptions. It is only through reflexivity can we be liberated from our limited visions.

Facing Subjects of Power: Exploiting Employers as Researchers

I went on to graduate school and to pursue a Ph.D. after I finished my fellowship. When it was time to work on my dissertation, I decided to focus

on Filipina domestics in Taiwan. I was careful about how I conceptualized these women workers this time. I was also careful not to see employers simply as oppressors. Constructing employers as oppressors is equally problematic as constructing domestics as victims.

Recruiting and interviewing Taiwanese employers was not difficult. Being a Taiwanese myself, they assumed that we shared similar views of Filipina domestics. They were often impressed by the fact that I was a doctoral student in the United States and were flattered that I was interested in interviewing them. When explaining what my research was, I was deliberate in the way I described it. I simply said that I was interested in understand their experiences as employers. While this explanation was true, it also contained very limited information. It withheld the information about my intention to understand how they “managed” their domestics.

Assuming that I shared their perspectives because of our common national, racial, and ethnic identities, Taiwanese employers didn’t have any reservations discussing their experiences. They talked about how they worried about their domestics running away, stealing, and getting pregnant. Employers were also concerned about how they would become belligerent after they attended church and learned bad attitudes from other women. They wanted to make sure that their domestics knew their place and were always docile and compliant.

One of the most memorable and fruitful interviews is with my cousin. My cousin wanted to give me as much information as possible to help my research. I, of course, didn’t explain in detail what my research was about. Right from the start of our interview, I realized that I was going to get the best data from all the interviews. He told me he did not let his domestic attend church on Sundays because he was afraid she would come home with an attitude or run away. He gave her extra money for staying home on Sundays. He locked her inside the house when he left for work. He didn’t want her to talk to other women in the neighborhood or go out to make phone calls to friends or relatives. If she had to buy things, he would drive her to the store. If they went on a vacation, they took her with them. While he interpreted that the trip was vacation time for her, she was essentially working throughout the trip.

He utilized time, space, and food to demarcate and maintain power hierarchy. He had a list of tasks for her to do every day and he required her

to record the time she did each task. He told her that she could not return to her room before ten o'clock in the evening. He did not allow her to stay in the living room and watch TV with the family. She had to stay in the dining room and wait to be called for services in the evening. He provided her with separate plates and utensils, which she could only use to eat with. He put her food on those plates after dinner.

I thought about confronting him about all these abusive practices. Yet I knew I was getting important data about employers' comprehensive practices to "manage" and thus control their domestics. I decided not to. While I knew my silence might reinforce and justify his racist views and abusive behaviors, I didn't want to sacrifice the opportunity to acquire the data. Of course, he did not know how I was going to portray him. He revealed everything because he trusted me.

Wasn't this a form of deception and a betrayal of our subjects' trust regardless of their status of power? Didn't I also exploit him based on our shared identities and family relationship? Or did the end justify the means? This story demonstrates that we confront moral dilemma in the process and that subjects in positions of power are also vulnerable to our exploitation.

Studying Whiteness and Confronting White Privileges

My current project examines the experiences of Polish immigrant domestics in Chicago. The case of Polish immigrant women raises some interesting questions. First, there is a century of immigration history between Poland and the United States. While Polish immigrants were seen as the racial other and the undesirable during early 20th century, Polish Americans are now one of the white ethnic groups. As white ethnics, they enjoy white privileges. Polish immigrant domestics' experiences are thus qualitatively different from those of immigrant women of color, e.g., Mexican domestics. This is not to say that Polish domestics do not experience discrimination and exploitation. They experience discrimination from the general society, Polish immigrant community, and Polish American community because of their occupation, immigration, and sometimes class statuses.

Interviewing Polish immigrant women about their racial/ethnic identity and white privileges is tricky in various aspects. While I share similar

experiences of discrimination due to my immigrant status, I also encounter discrimination based on my racial identity. Yet, I do have class privileges. Of course, we cannot rank discrimination as if they were static categories that can cancel each other out. Polish immigrant women, even when they have been in the United States for quite some time and are familiar with racial politics in this country, may not identify themselves as white. I informed them that white employers often would prefer to hire them and give them different tasks because they are white, as opposed to Mexican domestics, who are considered as the racial other. Understandably, they would dismiss the idea and focus on the reputation of Poles as hard working people. At times, they would mention the stereotypes about Mexicans as taking away jobs from Americans and draining social services. They would comment that Mexican women often have a lot of children and depend on the government for handouts. I usually politely pointed out that those were stereotypes. This response usually increased their defensiveness. Facing other forms of discrimination, it was difficult for them to acknowledge their white privileges.

Interviewing white employers also raises interesting issues. They usually started with the statement that Polish people worked hard. They would then talk about how they felt comfortable with Polish women because of “cultural” similarities. They would eventually somewhat reveal how this cultural familiarity came from the shared whiteness. The preference for whiteness manifested itself in task assignments, such as childcare. They explained that they preferred to hire Polish women because they had similar ways of caring for children while Mexican women raised children differently. They would describe Polish women as energetic and playing with children while Mexican women didn’t interact with children. Most importantly, they would explain that their children would adjust to Polish women more easily. The underlying implication was that the same skin color would make it easy for their children to identify with. Being an Asian and an immigrant, this conversation often reminded me of my own experiences of discrimination. I at times felt the urge to tell them my experiences of dealing with racism and subtly point out their prejudice. During these interviews, I often wondered if I, as a researcher, had certain responsibility to educate our research subjects, regardless of their locations along social hierarchy.

Conclusion: Complexity, Uncertainty, and Reflexivity through Interactions

I explore these experiences to show that research process involves complexity that cannot be captured by quantitative methods. While quantitative methods might answer the question of “what,” they cannot answer questions of “why” and “how.” To understand the subjectivity of actors, it is only possible through talking to them and then viewing the world from their points of view. Interactions with them engender researchers’ reflexivity and compel them to struggle with epistemological, methodological, ethical, and moral dilemmas, oftentimes with no solutions. This raises the question as to whether qualitative and quantitative methods are really complementary when the former creates the necessity of reflexivity.

Supporters of mixed methods question whether the epistemological foundation of these two methods are completely different. For example, there are different approaches within the category of qualitative methods. While qualitative methods are usually confined to local contexts and utilize a small sample of population, the increased qualitative design of multi-local research expands the geographical locations and increases the sample. Some qualitative methods, such as grounded theory, aim at building theories that can be generalized and applicable to other contexts. Many qualitative researchers subscribe to positivism and scientific paradigm. It is a sweeping generalization to treat all qualitative researchers as upholding the same beliefs. Most importantly, supporters of mixed methods argue that the combined use of these two methods can create the most well rounded data, which answers questions of what, how, and why.

While there is certain validity in these arguments, it doesn’t mean that there is still no epistemological and methodological chasm between these two methods. For example, quantitative researchers tend to believe that quantitative methods are value-neutral and are not embedded with politics. Yet, why do quantitative researchers study certain topics? Why do they choose to answer particular questions? Why do they correlate certain variables but not others? Through what lens do they use to interpret the data? Or can the statistical correlation really explain the complexity of the social world and human dynamics? All these are still shaped by historical,

socioeconomic, and political contexts. My contention is: Aren't quantitative researchers also vulnerable to their own politics, ideologies, privileges, and identities? It is thus equally necessary for quantitative researchers to reflect upon their modes of research.

Surveying articles using mixed methods, I find that researchers usually explain what data set and what variables they use for the quantitative component and how they go about generating qualitative data, such as sampling, in-depth interviews, participant observations, etc. Yet there is a missing piece from the methods section. First, while researchers explain the details of using mixed methods, they do not elaborate how they reconcile their different epistemological foundations or explain how these methods share similar epistemology. It is as if these two methods can be combined without any reflections that touch on foundational and fundamental issues. Further, they don't provide the necessary reflections about under what contexts their research question, data, and interpretations emerge. It is this reflection that I see as central to all research, regardless qualitative, quantitative or mixed methods. What I hold dear is the necessity of reflexivity on deeper epistemological and methodological concerns.

I am not absolutely against mixed methods. However, mixing these two methods is problematic in many ways as demonstrated by my research experiences. Without thinking deeper into their epistemological differences (or similarities), the act of mixing them without reflections is simply not sufficient. Reconciling and reflecting upon fundamental differences between these two methods would be the first essential step.

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