Qualitative or Mixed Methods Research Inquiry Approaches: Some Loose Guidelines for Publishing in *Sex Roles*

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The number of papers submitted to *Sex Roles* that present, analyze, and discuss qualitative data has been increasing in recent years (Frieze 2008, 2013). At the same time, mixed methods studies are becoming ever more popular within the fields of social and behavioral sciences, especially because mixed methods' design possibilities lend themselves well to interdisciplinary investigations. In addition to studies utilizing a qualitative approach, *Sex Roles: A Journal of Research*, a journal dedicated to multiple disciplines, also welcomes submissions that reflect upon mixed methods projects. To expand upon Editor Yoder's (2016) recent reflections on the directions and editorial practices of this journal, my editorial focuses on our expectations for both qualitative and mixed methods submissions to *Sex Roles*. As part of the *Sex Roles* editorial team, I look forward to providing consultation to the editor about qualitative and mixed methods research inquiry approaches.

Qualitative Approaches

Qualitative approaches to research aim to get at subjective meanings. The particular questions taken up by this type of approach privileges subjective and multiple viewpoints. Distinct from quantitative research, qualitative studies are less confirmatory, meaning that their primary aim is not to test a hypothesis, but instead to explore and discover meaning as identified by participants. Qualitative researchers extract the

co-created meanings they gather from their participants' data in order to get at multiple subjective accounts. The focus of research is generally words, texts, and images as opposed to the gathering of statistical data (numbers) and using language focused on variables, with the goal of generalizing and confirming research hypotheses. However, these differing emphases do *not* mean that qualitative researchers do not use numbers or that quantitative researchers do not use words. Rather, numbers can be used by a qualitative researcher as a way to summarize some of the major qualitative themes generated from participants' in-depth interviews. Qualitative researchers also test out emergent hypotheses on their qualitatively-driven data as they engage in writing reflexive memos, which inductively assist them with the coding and thematic analysis of their data.

Qualitative research spans disciplines and comprises diverse theoretical perspectives and methods practices for discovery and generation of knowledge. Because its approach is appropriate to a range of disciplines and research questions, examples of qualitative research vary considerably in terms of three main components: ontology (a philosophical system about the nature of social reality), epistemology (a philosophical system about who can be a knowledge builder), and methodology (the link between the paradigms, theoretical perspectives, and research questions that serve to determine a researcher's strategy or plan of how to answer a question). Explanations of all three help audiences understand the relationships among the research team, project design, and data analyses. The qualitative researcher's paradigmatic stance, which is composed of a perspective on the social world, serves to frame the entire research process, including topic selection, question formulation, method(s) selection, sampling, project design, and data analyses. Some, but not all, common research methods employed in qualitative studies include ethnography or field research, in-depth interviews, oral histories, autoethnography,

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and focus group interviews. Qualitative analytical techniques can vary, but some of the most commonly used techniques for analyzing data are discourse analysis, grounded theory, qualitatively-driven content or textual analysis, visual or audiovisual analysis, evaluation, historical comparative, ethnodrama, and narrative inquiry. The diversity of research perspectives, data gathering, and analytical methods is one of the defining features of the qualitative landscape and makes possible the vast range of research topics and questions it encompasses.

Mixed Methods Approaches

Qualitative approaches are not entirely distinct or incompatible with quantitative methods. Qualitative researchers can transform their data into numbers and quantitative researchers can transform their results into non-numerical data. However, combining qualitative and quantitative approaches within a single study can yield data that have both breadth and depth in terms of rich meaning. *Mixed methods* refers to the use of both qualitative and quantitative approaches and methods concurrently or sequentially in a single study or multiphase study. An important logic behind the application of this design is that it has the potential whereby “the whole is greater than the sum of its parts” (Greene and Caracelli 1997, p. 13). The combination of qualitative and quantitative approaches holds the promise of creating a synergistic research project in which one method enables the other to be more effective. Together, both methods may provide a fuller understanding of the research problem (Greene and Caracelli 1997). Mixed methods designs can also help to get at subjugated knowledge and give voice to those whose viewpoints are often left out of traditional research. Combining methods can often assist the researcher in tackling highly complex problems that involve several layers of understanding and may require different analytical techniques. It’s important to note here that while we use the term mixed methods what we are also mixing beyond data collection methods (techniques) are also different methodologies. Methodologies encompass the overall justification for the way our research proceeds and encompasses our general philosophical assumptions or world view concerning how knowledge building proceeds (Hesse-Biber 2010b).

Greene et al. (1989) discuss five specific reasons why researchers might want to use a mixed methods approach. The first and perhaps most common reason is triangulation. This strategy involves using more than one method to study the same research question with the goal of validation.

A second reason for employing a mixed methods design is that of complementarity, whereby the researcher seeks to gain a fuller understanding of the research problem and/or to clarify a given research result. A third reason to conduct

a mixed methods study is that of development, whereby “results from one method help develop or inform the other method” (Greene et al. 1989, p. 259). This development happens, for example, when a researcher uses the findings from an exploratory qualitative study in order to develop a survey questionnaire for the dominant quantitative component. A fourth reason cited for using mixed methods is that of initiation, whereby a given researcher’s survey findings raise questions or contain contradictions that require clarification in a new study which seeks to provide additional insight (Greene et al. 1989). Expansion, a fifth reason for performing mixed methods research, is initiated to “extend the breadth and range of the study” (Greene et al. 1989, p. 259). Here the goal is not to increase the validity of one’s specific study, but rather to broaden the study to encompass a broader range of purposes. Some mixed methods scholars draw a distinction between “mixed methods” and “mixed model” approaches, noting that mixed model approaches “combine the qualitative and quantitative approaches within different phases of the research process” (Tashakkori and Teddlie 1998, p. 19).

Mixed Methods Research Designs

When planning your mixed methods project, you will need to think about the type of mixed methods research design you anticipate for your study. However, sometimes the design you wind up with is more iterative, such that you only know later on that you need to add a different method (usually also a different question) to follow up on the findings from your first component. Two core questions to ask are: (a) What is the primary research method, and what is the secondary (complementary) method? Are both methods on equal footing? and (b) What is the sequencing of methods in your project in terms of concurrent (at more or less the same time) or sequential (first one then the other) qualitative and quantitative components?

Some mixed methods designs combine methods concurrently, and each is usually of equal status. This is often the case when the researchers’ goal is to triangulate their findings. In this type of design, the researcher gives priority to both quantitative and qualitative data and collects both types of data simultaneously but separately. The research findings from quantitative and qualitative analysis are then used to determine if the two different methods yield similar or dissimilar results, with the primary goal being validation. Still others talk about a concurrent design, whereby one method (qualitative or quantitative) is nested or embedded in the other, with the nested method given a lower priority and possibly even answering a different research question within the analysis (see Hesse-Biber 2010b; Hesse-Biber and Johnson 2015).

Other mixed methods research designs are done sequentially. One of these sequential mixed methods template designs is termed a *sequential exploratory mixed methods design*. When using this design, researchers emphasize the primacy of their qualitative data over their quantitative data. The quantitative study component that follows is then used to test theories generated from the qualitative component on different populations in order to ascertain whether the qualitative findings transfer to other populations, thus emphasizing external validity or generalizability. In addition, a qualitative study may be used before a quantitative one to provide the researcher who is unfamiliar with a given topic the opportunity to generate ideas or hypotheses to address more specifically in the quantitative part of the project. A second sequential design, a *sequential explanatory mixed methods design*, places emphasis on the quantitative component. The quantitative study is considered the primary mode of inquiry and is conducted before the qualitative study. This type of design is often used when there is a need to provide clarification on, or elaboration of, negative quantitative research results (outliers), that is, findings that do not appear to fit the overall hypothesis or theoretical perspective.

A general take-away point from this discussion of the design of mixed methods is to know that there are permutations and combinations of mixed methods research design templates. It is important not to force a given mixed methods design template into a research project. This flexibility is especially critical with qualitatively-driven mixed methods projects that tend to be much more iterative.

General Expectations for Manuscripts

Because both qualitative and mixed methods studies are dependent on the researchers' philosophical standpoints, *Sex Roles* expects submissions of both types to make the connections between the research question, methods, and analyses explicit. Because the methods used should follow directly from the research question, researchers should judge the efficacy of their methods in relation to their methods' ability to answer the research question. In the case of mixed methods studies, multiple questions from different theoretical lenses and methods will be appropriate to provide rich answers. The question and the methods must be tightly linked, and researchers should justify their research design selection in light of their research question(s). Methodology is not method. Methodologies justify and detail to your reader your overall research plan, and this plan extends beyond talking about the methods of data collection (see Hesse-Biber 2010a). A researcher must also be clear about their use of analytic and interpretive techniques. Multiple analytical methods may be used—for example, narrative analysis in conjunction with

grounded theory—if they provide the best understanding of the data.

Although there is flexibility within the study design and implementation of qualitative and mixed methods studies, there is *no* flexibility when it comes to study rigor. This means that all aspects of the study need to be transparent. It is important to provide an audit trail of your research procedures along the way. Researchers can leave no questions unanswered as to how the study progressed or which steps were taken regarding data collection analysis and interpretation. At the end of the study, researchers should return to the original issue or topic and retrace the steps of their study to explore both the possibility of missed opportunities as well as limitations with regard to the overall research steps and the certainty that their research question was fully answered given the scope of the study.

If researchers are embarking on qualitative or mixed methods studies, the following general research steps may be helpful (Hesse-Biber 2016):

- Step 1: Reflect on your own research standpoint before you begin. How does your standpoint impact the research you have in mind?
- Step 2: Maintain a tight link between the research question and your research design. How does your design fit your research question?
- Step 3: Formulate your research question. What do you intend to ask? This should be grounded in the research literature as well. Ethical considerations must be addressed, and if conducting a mixed methods study, know that these concerns will differ slightly depending on your approach.
- Step 4: Draw a research sample. Who or what can provide information about your question? Be sure to talk about your qualitative and your quantitative samples, if you are conducting a mixed methods project.
- Step 5: Determine your method or methods of data collection. How will your methods best obtain the data you seek in order to address your research problem?
- Step 6: Determine how you will analyze and interpret your data. How will your analysis plan fit with your question and data? If conducting mixed methods research, please articulate how you will place both datasets and their findings in conversation with one another.
- Step 7: Determine how you will write up your study. Which findings will you explain? If you are conducting a mixed methods study you need to present your study as one study and not published as separate findings in two different journals.
- Step 8: Detail any issues of validity and reliability as well as any limitations in your study. In what ways do your study's limitations affect your findings? If conducting a mixed methods study, know that quantitative and qualitative validity take on different meanings.

Sex Roles welcomes qualitative and mixed methods studies that consider methodological concerns in the course of revealing empirical findings; that is, the journal expects all submissions to be attentive not only to what the research shows, but also to how that research was carried out and why the research was structured according to a specific design. My editorial primarily focuses on defining features of qualitative and mixed methods studies, but methodological features are not the only significant ones. Following publication convention, submissions need to be placed in a context of recent findings, current debates, field-specific theories or practice, and socio-cultural environments. Literature reviews within a research paper must review well-cited published works on the topic and identify several researchers or research teams who contribute to the field's research landscape. Researchers should be aware of field-specific research communities, practices, and traditions that may shape the current research. For additional resources and examples of qualitative and mixed methods research, please see the Robert Wood Johnson Foundation's comprehensive Qualitative Research Guidelines Project (Cohen and Crabtree 2006).

Submissions should be attentive to the question–methods relationship and demonstrate reflection on the processes from which the research emerged. Due to variability in terms of project design and implementation, all types of studies are appropriate for submission, not only exploratory, descriptive, and explanatory structures. Because qualitative approaches focus on participants' responses, the inclusion of direct participants' responses is important, although the degree to which responses are central to the submission may vary. Researchers should reflect on their research question, project design, and data collection and analysis methods selection; potential bias; study limitations; and, when applicable and available, study-specific details such as participants' demographics, site descriptions, recruiting procedures, coding processes, scales, theoretical frameworks, statistical models, etc. Other issues that researchers might consider when preparing a submission include, but are not limited to, process details, methodological value, design innovation, and empirical relevance.

In terms of format, *Sex Roles* is open to submissions that adhere to its guidelines but is flexible regarding section-specific word count and the degree to which researchers highlight either their methodological or empirical contributions to their respective fields and to the field of interdisciplinary feminist research more generally. Tables and figures that illustrate the research are welcomed and, in cases of complicated or iterative research designs, encouraged. Researchers who perform qualitative studies nevertheless work with numbers and datasets, and it is in the best interest of the researcher to include analytical graphics that display patterns either in numerical or non-numerical data; in the case of the latter, such data can be transformed into text tables (Sandelowski 2003).

Conclusion

Both qualitative and mixed methods studies offer unique positions from which new questions can be asked and previously hidden information can be revealed. The flexibility inherent in both types of research results in exciting possibilities for researchers. These guidelines, designed to clarify the nature of qualitative and mixed methods and to set *Sex Roles*' expectations for manuscript submissions, should be helpful for those preparing their findings. Researchers also should seek additional reading in methodological and design possibilities in order to gain further knowledge of the background and movement of qualitative and mixed methods research. Although *Sex Roles* has largely published quantitative research across its history (Chrisler 2010). Editor Yoder and I look forward to making *Sex Roles* a receptive home to the burgeoning, exciting, and increasingly sophisticated qualitative and mixed methods research that is being done to study gender and gendered contexts across the social and behavioral sciences.

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