

—4TH EDITION—

UWE FLICK

INTRODUCING RESEARCH METHODOLOGY

THINKING YOUR WAY THROUGH
YOUR RESEARCH PROJECT

 **Sage**



1 Oliver's Yard
55 City Road
London EC1Y 1SP

2455 Teller Road
Thousand Oaks
California 91320

Unit No 323-333, Third Floor, F-Block
International Trade Tower
Nehru Place, New Delhi – 110 019

8 Marina View Suite 43-053
Asia Square Tower 1
Singapore 018960

Editor: Charlotte Bush
Editorial assistant: Pippa Wills
Production editor: Victoria Nicholas
Marketing manager: Ben Griffin-Sherwood
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ABOUT THE AUTHOR

Uwe Flick is Senior Professor of Qualitative Research in Social Science and Education at the Freie Universität Berlin, Germany. He is a trained psychologist and sociologist and received his PhD from the Freie Universität Berlin in 1988 and his Habilitation from the Technical University of Berlin in 1994. He has been Professor of Qualitative Research at Alice Salomon University of Applied Sciences in Berlin, Germany and at the University of Vienna, Austria. Previously, he was Adjunct Professor at the Memorial University of Newfoundland in St John's, Canada; a lecturer in research methodology at the Freie Universität Berlin; a reader and assistant professor in qualitative methods and evaluation at the Technical University of Berlin; and Associate Professor and Head of the Department of Medical Sociology at the Hannover Medical School. He has held visiting appointments at the London School of Economics, the École des Hautes Études en Sciences Sociales in Paris, Cambridge University (UK), Memorial University of St John's (Canada), University of Lisbon (Portugal), Institute of Higher Studies in Vienna, in Italy and Sweden, and the School of Psychology at Massey University, Auckland (New Zealand). His main research interests are qualitative methods and triangulation, social representations in the fields of individual and public health, vulnerability in fields like youth homelessness and migration, and technological change in everyday life. He is the author of *Designing Qualitative Research* (Sage, 2nd edition, 2018) and *Managing Quality in Qualitative Research* (Sage, 2nd edition, 2018), *Doing Triangulation and Mixed Methods* (Sage, 2018) and *Doing Grounded Theory* (Sage, 2018). He is also the editor of *The SAGE Handbook of Qualitative Data Analysis* (Sage, 2014), *The SAGE Qualitative Research Kit* (Sage, 2nd edition, 2018), *The SAGE Handbook of Qualitative Data Collection* (Sage, 2018), *A Companion to Qualitative Research* (Sage, 2004), *Psychology of the Social* (Cambridge University Press, 1998), *Quality of Life and Health: Concepts, Methods and Applications* (Blackwell Science, 1995) and *La perception quotidienne de la Santé et de la Maladie: Théories subjectives et Représentations sociales* (L'Harmattan, 1993). His most recent publications are *Doing Interview Research* (Sage, 2022), the seventh edition of *An Introduction to Qualitative Research* (Sage, 2023), the *Sage Handbook of Qualitative Research Design* (2 volumes, editor, Sage, 2022) and the *Sage Handbook of Qualitative Research Quality* (editor, Sage, 2025). In 2019, Uwe Flick received the Lifetime Award in Qualitative Inquiry at the 15th International Congress of Qualitative Inquiry.



PREFACE TO THE FOURTH EDITION

Several recent developments have shaped the context of this book. First, a stronger interest in decolonizing and Indigenous research has led to new questions and a new sensitiveness in and about research methodology. This is linked to two aims: to stimulate a new kind of reflection in learning, teaching and applying research methods in general, and at the same time to make research methodology more reflexive for becoming adequate for learning, teaching, and doing Indigenous and decolonizing research in and with communities in the field. The second development is the growing interest in making research (more) transparent. This has been a general idea for a while and a criterion or claim in assessing the quality of research for quite some time. But now it is on the agenda to spell out in more detail how to put transparency into practice concrete terms throughout the whole research process, meaning in each step of the overall project or study.

Other developments relevant to the third edition remain important for the new fourth edition. First, the political and practical relevance of social research has grown. Empirically based knowledge on such issues as the gap between rich and poor, changes in the incidence of diseases and the effects of social disadvantage provide the basis for decision-making, both in policy and in professional practice.

Second, an increasing number of university programs include either introductory or advanced training in the principles and methods of social research. In most cases, this covers questions not only of how to understand existing research, but also how to conduct research projects (on whatever scale). Sometimes this training is embedded in a course or research-based teaching. Often, however, the research project forms a basis for the final (bachelor's, master's, or doctoral) thesis and students may be more or less working on their own whilst planning and running their research projects.

BACKGROUND TO THE BOOK

Two background experiences have informed the writing and revision of this book. First, there is my own experience of conducting social research in several fields (including health, chronic conditions, youth studies, technological change, ageing and sleep, migration and employment). This experience has taught me a good deal about the problems that arise in research and how to deal with them. Second, my experience of teaching social research methods to students and doing social research projects comes from working with

students in psychology, sociology, social psychology, nursing, public health and education. This experience has taken several forms, including research-based teaching, seminar projects, and supervising numerous bachelor, master's and PhD theses. This work has helped me to discover which examples of other researchers' work most serve to inform what research is about.

AIMS OF THE BOOK

This book is designed to help readers who are embarking on social research projects. There are, of course, numerous resources on social research already available, including some comprehensive textbooks. In introducing social research, however, comprehensiveness is not necessarily a virtue. Comprehensive treatments tend to be bulky and unwieldy and they can be overwhelming in the detail they present.

In contrast, this book aims to provide the reader with a concise overview. It outlines the most important approaches likely to be used in social research projects. And it provides a good deal of practical information on how to proceed with a project. It also includes guidance on, and reference to, further sources on the subject. And it aims to support readers to reflect on the developments mentioned at the beginning and to develop a sensitive identification with social research and research methodology.

OVERVIEW OF THE BOOK

Although all chapters and parts have been updated and slightly extended, the basic structure of the book has been maintained. The first part of the book will give you an *orientation* to the field of social research. It focuses on issues that come into play as one begins to approach a research project. Chapter 1 provides an introductory overview of what social research is, what you can do with it – and what you can't. It also addresses quantitative and qualitative research as two legs of social research. Chapter 2 gives a brief introduction to the major worldviews behind quantitative and qualitative research. Chapter 3 outlines issues of research ethics in quantitative and qualitative research, including data protection, codes of ethics and the role of ethics committees. The fourth chapter shows how research questions originate and how they can be developed and refined. It considers research questions in the context of both qualitative and quantitative research. This chapter also outlines the role of hypotheses.

The second part of the book deals with *planning and designing* a research project. Chapter 5 shows how to find existing research literature and how to use it in your own project. The sixth chapter provides a short overview of the major steps involved in the research process (for both quantitative and qualitative research). Chapter 7 focuses on the design of quantitative and of qualitative research. First, it provides guidance on how to develop a research proposal and a timescale for your project. In the next step, it discusses key research designs

in quantitative and qualitative research. The last part of this chapter deals with sampling – the selection of participants. Some of the major strategies of sampling are described.

In the third part of the book, we turn to the issue of *selecting methods*. The eighth chapter outlines the selection of methods and approaches to be used for pursuing your own research question. A central focus is on the decisions you will need to make at various stages of the research process. Chapter 9 considers ways of combining approaches through triangulation and mixed methods, which are presented as alternatives. The main focus is on triangulation and mixed methods as issues of designing and selecting methods for a specific study.

The fourth part of the book turns to the business of *working with data*. First, the ways of using existing data for one's own study are discussed. Secondary analysis, re-analysis and the use of documents (texts, images, virtual and social media data) are discussed in the new Chapter 10. Methods of collecting new data are the focus of Chapter 11. Surveys, interviews and observation are all discussed here and issues concerning measurement and documentation are outlined. The analysis of quantitative and qualitative data, whether existing or newly created data, is the topic of Chapter 12. This chapter introduces content analysis, descriptive statistics and qualitative analysis, as well as case studies and the development of typologies.

The fifth and final part of the book addresses issues of *reflection and writing* about your project as a whole and presenting its results. Chapter 13 focuses on the evaluation of empirical studies in quantitative and qualitative research. Criteria for evaluation in both areas, as well as questions of generalization, are discussed. This chapter also discusses the limitations of the various methods in quantitative and qualitative research and of each approach in general. The final chapter discusses issues of writing about research. It describes how results in qualitative and quantitative research can be presented and, in particular, how to provide feedback to participants and how to use results in practical contexts and in wider debates.

FEATURES OF THE BOOK

Every chapter begins with *a list of what I hope you will learn* from each chapter. *Two types of case study* are presented in boxes throughout the book to illustrate methodological issues: in boxes labeled *Research in the real world* examples refer to research from experienced, professional researchers. Boxes labeled *Student research spotlight* present students' use of qualitative or quantitative research in their bachelor's or master's thesis. At the end of each chapter, you will find checklists for *what you need to ask yourself* about the topics in the chapter and *what you need to succeed* whilst planning and conducting a research project. These checklists provide readily accessible guidance that can be referred to over and over again as your project progresses. A summary of *what you have learned* and suggestions about *what's next* in terms of further reading conclude each chapter. A *glossary* explaining the most important terms and concepts used in the text is included at the end of the book.

THE FOURTH EDITION – WHAT IS NEW?

The fourth edition includes a large number of revisions to the chapters in earlier editions. They consist of a stronger focus on quantitative research and qualitative research as two legs of social research. Their common features, their individual characteristics and their differences are more clearly highlighted in the new edition of the book. Issues of research ethics for both legs of social research are given more prominence. Chapter 2 on worldviews in quantitative and qualitative research has been extended with a section on pragmatism and sets up a stronger epistemological framework for introducing both approaches, including critical approaches to social research. Chapter 5 on reading and reviewing the literature has been complemented by sections about systematic, scoping and critical reviews of the literature. The chapter on deciding between methodological approaches in the research process has been refined. The core chapters on data collection and data analysis have been extended by including a wider range of methodological approaches. They are complemented by Chapter 10 on using existing data for your research. The discussion of issues about virtual and digital research has been extended by using social media research and Big Data as up-to-date approaches to doing social research. Online and digital research issues have been integrated in the discussion of ethics, design and methods in other chapters. In all chapters you will find new sections on the implications for Indigenous research. You will also find sections in every chapter linking the topic to how to provide transparency in research work. Finally, the focus on designing students' research projects is now stronger in the book.

I hope that this book and, in particular, its current revised edition will stimulate your curiosity about doing a social research project and, by guiding you through such a project, show you that doing a research project can be an enjoyable and exciting experience.

ONLINE RESOURCES



Designed to support students thinking through every step of the research process, the fourth edition of *Introducing Research Methodology* offers a range of online resources for lecturers. Find them at: <https://study.sagepub.com/flickirm4e>.

FOR INSTRUCTORS

Download **PowerPoint slides** featuring figures and tables from the book, which can be customised for use in your own lectures and presentations.

Check your students' understanding with a **test bank** of multiple choice questions related to the key concepts at each stage of the research process that can be used in class, as homework or exams.

Support your teaching with a detailed **Lecturer's guide**, featuring case studies, checklists, teaching suggestions and further reading resources for each chapter.



I ORIENTATION

Part I of this book has four aims. First, it seeks to introduce social research in general. It considers what social research is, what distinguishes it, what forms it takes, and how it can (and cannot) be used. Decolonizing **Indigenous research** is introduced as a current issue of social research. These are the topics in Chapter 1.

Second, it seeks to lay a foundation for your own research project. In Chapter 2, we will address the basic worldviews of (quantitative and qualitative) research and their differences. In Chapter 3, we discuss research ethics and what it means to make a research project ethically sound. In the process, we consider codes of ethics and ethics committees, as well as specific problems of online research in this context. Chapter 4 introduces issues around developing research interests. It considers what a research question is and how such questions may be developed. The chapter also considers hypotheses – what they are and how and when they are useful.

These four chapters together also introduce a theme that runs throughout the book, namely the distinction and the relationship between qualitative and quantitative research, and the relevance of decolonizing and Indigenous research.



1

WHY SOCIAL RESEARCH?

How this chapter will help you

You will:

- gain an introductory understanding of social research
- begin to see the similarities and differences between qualitative and quantitative research
- appreciate (a) the tasks social research has, (b) what social research can achieve, and (c) what aims you can achieve through it, and
- see the role of new challenges, such as decolonizing social research methods and traditions, and transparency in research

WHAT IS SOCIAL RESEARCH?

Increasingly, science and research – their approaches and results – inform public life. They help to provide a basis for political and practical decision-making. This applies across the range of sciences – not only to natural science and medicine, but to social science too. Our first task here is to clarify what is distinctive about social research.

Everyday Life and Social Science

Many of the issues and phenomena with which social research engages also play a role in everyday life. Consider, for example, one issue that is obviously highly relevant to everyday life, namely health. For the most part, health becomes an explicit issue in everyday life only when health-related problems occur or are threatening individuals. Symptoms produce an urge to react and we start to look for solutions, causes and **explanations**.

If necessary, we may go to see a doctor and may end up changing our habits and behaviors – for example, by taking more exercise.

This search for causes and explanations, and people's own experiences, often lead to the development of everyday theories (e.g. 'An apple a day keeps the doctor away'). Such theories are not necessarily spelled out explicitly; they often remain implicit. The question of whether everyday explanations and theories are correct or not is usually tested pragmatically: do they contribute to solving problems and reducing symptoms or not? If such knowledge allows the problem at hand to be solved, it has fulfilled its purpose. Then it is not relevant whether such explanations apply to other people or in general. In this context, scientific knowledge (e.g. that smoking increases the risk of cancer) is often picked up from the media.

However, we should also take into account that everyday knowledge may be different in various social and cultural contexts. For people with a Maori background in New Zealand or an African background, health may be linked to different topics, practices, rituals, and threats compared to people living in Western Europe for example.

Health, health problems and how people deal with them constitute issues for social research too. But in social science we take a different approach. Analysis of problems is foregrounded and study becomes more systematic. This aims at breaking up routines in order to prevent harmful behaviors – for example, the relationship between specific behaviors (like smoking) and specific health problems (such as the likelihood of falling ill with cancer). To achieve such an aim, we need to create a situation free of pressure to act. For example, you will plan a longer period for analyzing the problem without the pressure of immediately finding a solution for it. Here, knowledge results not from intuition, but from the examination of scientific theories. The development of such theories involves a process of explicitly spelling out and testing relations, which is based on using **research methods** – like a **systematic review** of the literature (see Chapter 5) or using **questionnaires** in a **survey** (see Chapter 11). For both aims – the developing and testing of theories – social research methods are used. The resulting knowledge is abstracted from the concrete example and further developed in the direction of general relations. Unlike in everyday life, here the **generalization** of knowledge is more important than solving a concrete problem in the particular case. Scientific research is more and more confronted with the expectation that its results have an impact on the field that is studied or on the way a society deals with an issue or (social) problem (see Chandler, 2013; Denicolo, 2013).

Everyday knowledge and problem solving can of course become the starting points for **theory development** and empirical research. We may ask, for example, which types of everyday explanations for a specific disease can be identified in **interviews** with patients, in particular if these come from various social and cultural or **vulnerable groups**.

Table 1.1 presents the differences between everyday knowledge and practices on the one hand, and science and research on the other. It does so on three levels, namely (1) the context of knowledge development; (2) the ways of developing knowledge and the state of the knowledge which is produced; and (3) the mutual relations between everyday knowledge and science.

Table 1.1 Everyday knowledge and science

	Everyday knowledge and practices	Science and research
Context of knowledge (production)	Pressure to act Solving of problems is the priority: • routines are not questioned • reflection in case of practical problems	Relief from a pressure to act Analyzing problems is the priority: • systematic analysis • routines are questioned and broken down
Forms of knowledge (production)	Intuition Implicit development of theories Experience-driven development of theories Pragmatic testing of theories Check solutions for problems	Use of scientific theories Explicit development of theories Methods-driven development of theories Methods-based testing of theories Use of research methods
State of knowledge	Specific knowledge and practices referring to dealing with particular situations	Abstract and generalizing
Role of knowledge	Understanding and maybe problem-solving in concrete contexts and situations	Impact on social or societal problems and their solution
Relationship between everyday knowledge and science	Everyday knowledge can be used as a starting point for theory development and empirical research	Everyday knowledge is increasingly influenced by scientific theories and results of research

What, then, characterizes social research in dealing with such issues? Here we may itemize a number of characteristics, each of which is explored further in this book:

- Social research approaches issues in a systematic and, above all, empirical way.
- For this purpose, you will develop research questions (see Chapter 4).
- To answer these questions, you will use, collect and analyze data.
- You will use, collect and analyze these data by applying research methods (see Chapters 10, 11 and 12).
- The results are intended to be generalized beyond the examples (cases, **samples**, etc.) that were studied (see Chapter 13).
- Approaches, practices and results in the social sciences should be sensitive to cultural differences and to the demands of decolonizing social research.
- From the systematic use of research methods and their results, you will derive descriptions or explanations of the phenomena you study.
- For a systematic approach, time, freedom and (other) resources are necessary (see Chapter 7).

Definition of Social Research

As we shall see, there are different ways of doing social research. First, though, we can develop a preliminary general definition of social research derived from our discussion so far.

Social research is the systematic analysis of research questions by using empirical methods (e.g. of asking, observing, re-using and analyzing data). Its aim is to make empirically grounded statements that can be generalized or to test such statements. Various approaches can be distinguished as can a number of fields of application (health, education, poverty, etc.). Various aims can be pursued, ranging from an exact description of a phenomenon to its explanation, or to the evaluation of an intervention or institution.

This definition provides an orientation for our journey through social research in this book. What are basic concepts in social research?

BASIC CONCEPTS IN SOCIAL RESEARCH

We should distinguish several concepts used in describing social research in more detail, which will be briefly defined next.

Methodology

We find various definitions of the term – for example, this one at the University of the Witwatersrand, LibGuides, Research Support at Johannesburg, ZA:

Research methodology is the specific procedures or techniques used to identify, select, process, and analyze information about a topic. In a research paper, the methodology section allows the reader to critically evaluate a study's overall validity and reliability. The methodology section answers two main questions: How was the data collected or generated? How was it analyzed? (<https://libguides.wits.ac.za/c.php?g=693518&p=4914913>)

Other definitions more strongly emphasise that '**methodology**' is the conceptual link between theory and research practice. Examples are **experimental** research or ethnographic research (see Chapter 2).

Research Approach

Research approaches are the frameworks for making this link work in a specific study. They consist of plans and procedures linking assumptions about research with methods of collecting and analyzing data, for example using a biographic approach to study migration (see Chapter 4).

Research Design

Research designs are plans of how to, for example, study migration with a biographic approach in a concrete study. This consists of selecting participants (which ones and how many), defining groups to compare (people from Africa and from Latin America migrating

to Europe), methods (which kind of interview or questionnaire to be used) and the like (see Chapter 7).

Methods

Methods are the concrete instruments that are applied in a study – which type of interview or which type of questionnaire is used for collecting data with the target group of the research (see Chapters 8 and 10) and for analyzing these data (see Chapter 12).

Figure 1.1 illustrates the links between these concepts on the way from a theory and interest to a concrete study.

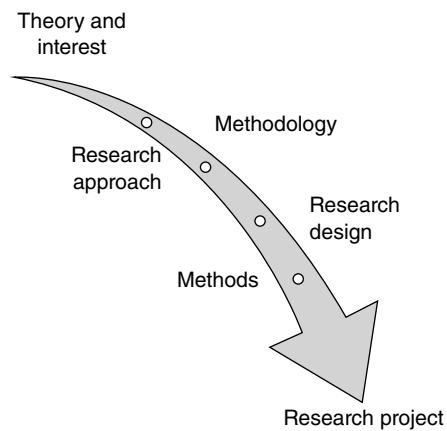


Figure 1.1 Basic concepts from theory to research

THE TASKS OF SOCIAL RESEARCH

We can distinguish three main tasks for social research. To do so, we use the criterion of how the results of social research may be used.

Knowledge: Description, Understanding and Explanation of Phenomena

A central task of social research originates from scientific interests, which means that the production of knowledge is prioritized. Once a new phenomenon, such as a new disease, arises, a detailed description of its features (symptoms, progression, frequency, etc.) on the basis of data and their analysis becomes necessary. The first step can be a detailed description of the circumstances under which it occurs or an analysis of the subjective experiences of the patients. This will help us to understand the contexts, effects and meanings of the disease.

Later, we can look for concrete explanations and test which factors trigger the symptoms or the disease, which circumstances or medications have specific influences on its course, etc. For these three steps – (a) description, (b) understanding and (c) explanation – the scientific interest in new knowledge is dominant. Such research contributes to **basic research** in that area. Here, science and scientists remain the target group for the research and its results.

Practice-Oriented Research: Applied and Participative research

Increasingly, social research is being conducted in practical contexts such as hospitals and schools. Here, research questions focus on practices – those of teachers, nurses or physicians – in institutions. Or they focus on the specific conditions of work in these institutions – routines in the hospital or teacher–student relations, for example. The results of **applied research** of this kind are also produced according to rules of scientific analysis. However, they should be relevant to the practice field and the solution of problems in practice.

A special case here is **participatory action research**. Here, the changes initiated by the researcher in the field of study do not happen only after the end of the study and the communication of its results. The intention is rather to initiate change *during* the process of research and by the very fact that the study is being done. Take, for example, a study of nursing with migrants. A participatory action research study would not set out merely to describe the everyday routines of nursing with migrants. Rather, it would initiate the process of research immediately in those everyday routines. It would then feed back to participants the information gathered in the research process.

This changes the relationship between researcher and participant. A relationship which is usually monologic in traditional research (e.g. the interviewees unfold their views, the researchers listen) becomes dialogic (the interviewees unfold their views, the researchers listen and make suggestions for how to change the situation). A subject–object relationship turns into a relationship between two subjects – the researcher and the participant. The evaluation of the research and its results is no longer focused solely on the usual scientific criteria (as will be discussed in Chapter 13). Rather, the question of the usefulness of the research and its results for the participant becomes one of the main criteria. Research is no longer just a knowledge process for the researchers, but rather a process of knowledge, learning and change on both sides.

Grounding Political and Practical Decisions

Since the middle of the twentieth century, social research has become more important as a basis for decisions in practical and political contexts. In most countries, regular surveys in various areas are common practice; reports on health, on poverty and on the situation of the elderly and of youth and children are produced, often commissioned by government. In many cases, such monitoring does not involve extra research, but rather summarizes existing research and results in the field. But, as the PISA studies or the HBSC study (Hurrelmann et al., 2003) show, in areas like health, education and youth, additional studies do sometimes

Table 1.2 Tasks and research areas of social research

Research area	Features	Aims	Example	Studies refer to
Basic research	Development or testing of theories	General statements without a specific link to practices	Trust in social relationships	Random sample of students or unspecific groups
Applied research	Development or testing of theories in practical fields	Statements referring to the particular field Implementation of results	Trust in doctor–patient relations	Doctors and patients in a specific field
Participatory action research	Analyzing fields and changing them at the same time	Intervention in the field under study	Analysis and improvement of nursing for migrants	Patients with a specific ethnic background, for example, who are (not sufficiently) supported by existing home care services
Evaluation	Collection and analysis of data as a basis for assessing the success and failure of an intervention	Assessment of institutional services and changes	Improvement of the relationship of trust between doctors and patients in a specific field with better information	Patients in a specific field
Health monitoring	Documentation of health-related data	Stocktaking of developments and changes in the health status of the population	Frequencies of occupational diseases	Routine data of health insurance

contribute to the basis of these reports. In the HBSC study, representative data about 11- to 15-year-old adolescents in the population are collected. At the same time, case studies with purposefully selected cases are included. Where data from representative studies are not available or cannot be expected, sometimes only case studies provide the basis for data.

In many areas, decisions about establishing, prolonging or continuing services, programs or institutions are based on evaluations of existing examples or experimental programs. Here, social research not only provides data and results as a basis for decisions, but also makes assessments and evaluations – by, for example, examining whether one type of school is more successful in reaching its goals than a different type. Therefore, the potential for implementation of research results, and more generally the impact of research beyond academia, become more important. Chandler (2013, p. 3) states:

The context within which that impact takes place is broad beyond academia in the realms of society, economy, public policy or services, health, the environment or quality of life. The outcomes or indicators of impact encompass the individual, community or global levels and are the application of new knowledge or understanding in the development of policy, creation of products or services.

Table 1.2 summarizes the tasks and research areas of social research outlined above, using the context of health as an example.

WHAT CAN YOU ACHIEVE WITH SOCIAL RESEARCH?

In the areas just mentioned, we can use social research to:

- explore issues, fields and phenomena and provide first descriptions
- discover new relations by collecting and analyzing data
- provide empirical data and analyses as a basis for developing theories
- **test** existing theories and stocks of knowledge empirically
- document the effects of interventions, treatments, programs, etc. in an empirically based way
- provide knowledge (i.e. data, analyses and results) as an empirically grounded basis for political, administrative and practical decision-making

What is Social Research Unable to Do and What Can You Do With it?

Social research has its limits. For example, the aim of developing a single grand theory to explain society and the phenomena within it, which also withstands empirical testing, could not be achieved. And there is no one method for studying all relevant phenomena. Moreover, social research cannot be relied upon to provide immediate solutions for current, urgent problems. On all three levels, we have to rein in our expectations of social research and pursue more realistic aims.

What we can aim to do is develop, and even test empirically, a number of theories. They can be used to explain certain social phenomena. We can also continue to develop a range of social science methods. Researchers can then select the appropriate methods and apply them to the problems they wish to study. Finally, social research provides knowledge about details and relations, which can be employed to develop solutions for societal problems.

QUANTITATIVE AND QUALITATIVE RESEARCH

We need now to turn to the distinction between qualitative and quantitative research. This distinction is only briefly introduced here but will feature frequently and will be spelled out in more detail throughout this book. ‘Qualitative research’ and ‘quantitative research’ are both umbrella terms for a number of approaches, methods and theoretical backgrounds –

that is, each of these two terms in fact covers a wide range of procedures, methods and approaches. Nevertheless, they are useful. Here, therefore, we develop an outline of the two approaches (for more details, see Bryman, 2016; Clark et al., 2021; and Flick, 2023) and consider what characterizes each of them.

Quantitative Research

Quantitative research can be characterized as follows. In studying a phenomenon (e.g. student stress), you will start from a concept (e.g. a concept of stress), which you spell out theoretically beforehand (e.g. in a model of stress, which you set up or take from the literature). For the empirical study, you will formulate a **hypothesis** (or several hypotheses), which you will test (e.g. that for students in humanities, university is more stressful than for students in the natural sciences). In the empirical project, the procedure of **measurement** has high relevance for finding out differences among persons concerning the characteristics you study (e.g. there are students with more and less stress).

In most cases, we cannot immediately expose a theoretical concept to measurement. Rather, we have to find **indicators** that permit a measurement in place of the concept. We may say that the concept has to be *operationalized* in these indicators. In our example, you could operationalize stress before an exam by using physiological indicators (e.g. higher blood pressure) and then apply blood pressure measurements. More often, researchers operationalize research by using specific statements (e.g. 'Before exams, I often feel under pressure') with specific alternative answers (as in the example in Figure 1.2).

Data collection is designed in a standardized way (e.g. all participants in a study may be interviewed under the same circumstances and in the same way). The methodological ideal is the kind of scientific measurement achieved in the natural sciences. By **standardization** of the data collection and of the research situation, the criteria of **reliability**, **validity** and **objectivity** (see Chapter 13) can be met.

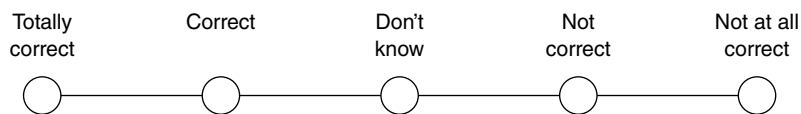


Figure 1.2 Alternatives for answering on a Likert scale

Quantitative research is interested in causalities – for example, in showing that stress before an exam is caused by the exam and not by other circumstances. Therefore, you will create a situation for your research in which the influences of other circumstances can be excluded as far as possible. For this purpose, instruments are tested for the consistency of their measurement, such as in repeated applications. The aim of the study is to achieve generalizable results: that is, your results should be valid beyond the situation in which they were measured (the students also feel the stress or have the higher blood pressure before exams when they are not studied for research purposes). The results from the group of students that participated need to

be transferable to students in general. Therefore, you will draw a sample, which you select according to criteria of **representativeness** – the ideal case is a **random sample** (see Chapter 7) – from the **population** of all students. This will mean that you can generalize from the sample to the population. Thus, the particular participants are relevant not as individuals (how does the student Joe Bauer experience stress before exams?) but rather as typical examples. It is not so much the students' entire situation, but rather their specific (e.g. physiological) reactions to a certain condition (a coming exam) that are relevant.

The emphasis on measurement, as in the natural sciences, relates to an important research aim, namely replicability – i.e. the measurement has principally to be able to be repeated, and then, provided the object under examination has not itself changed, to produce the same results. In our example: if you measure blood pressure for the same student before the exam repeatedly, the measured values must be the same – except if there are good reasons for a difference, such as if blood pressure rises as the exam gets closer.

Quantitative research works with numbers. To return to our example: because measurement produces a specific figure for blood pressure, the alternatives for answering in Figure 1.2 can be transformed into numbers from 1 to 5. These numbers make a statistical analysis of the data possible (see Bryman, 2016 for a more detailed presentation of these features of quantitative research). Kromrey (2006, p. 34) defines the 'strategy of the so-called quantitative research' as 'a strictly goal-oriented procedure, which aims for the "objectivity" of its results by a standardization of all steps as far as possible and which postulates intersubjective verifiability as the central norm for quality assurance'.

The participants may experience the research situation as follows. They are relevant as members of a specific group from which they were selected randomly. They are confronted with a number of predefined questions, for which they also have a number of predefined answers, of which they are expected to choose only one. Information beyond these answers, as well as their own assumptions, subjective states or queries and comments on the questions or the issue, are not part of the research situation.

Qualitative Research

Qualitative research sets itself other priorities. Here, you do not necessarily start from a theoretical model of the issue you are studying and refrain from hypotheses and **operationalization**. Also, qualitative research is not modeled on measurement as found in the natural sciences. Finally, you will not be interested in standardizing the research situation as far as possible nor in guaranteeing representativeness by the random **sampling** of participants.

Instead, qualitative researchers select participants purposively and integrate small numbers of cases according to their relevance. Data collection is designed much more openly and aims at a comprehensive picture made possible by reconstructing the case under study. Thus, fewer questions and answers are defined in advance; there is greater use of **open questions**. Participants are expected to answer these questions spontaneously and in their own words. Often, researchers work with **narratives** of personal life histories.

The example in Box 1.1 demonstrates how a research question for which not much empirical research was available can be addressed in a student project with **qualitative methods**.

Qualitative research addresses issues by using one of the following three approaches. It aims (a) at grasping the subjective meaning of issues from the perspectives of participants (e.g. what does it mean for interviewees to experience their university studies as a burden?). Often, (b) latent meanings of a situation are in focus (e.g. which are the unconscious aspects or the underlying conflicts that influence the experience of stress for the student?). It is less relevant to study a cause and its effect than to describe or reconstruct the complexity of situations. In many cases, (c) social practices and the life world of participants are described. The aim is less to test what is known (e.g. an existing theory or hypothesis) than to discover new aspects in the situation under study and to develop hypotheses or a theory from these discoveries. Therefore, the research situation is not standardized; rather it is designed to be as open as possible. A few cases are studied, but these are analyzed extensively in their complexity. Generalization is an aim not so much on a statistical level (generalization to the level of the population, for example) as on a theoretical level. (For a more detailed presentation of these features, see Flick, 2023.)

BOX 1.1 STUDENT RESEARCH SPOTLIGHT

The Emancipation of Refugee Women in Germany

For her empirical bachelor thesis in education, Jackleen Khazal (2019) was interested in exploring the influence of experiences of being a refugee on Syrian women's emancipation in Germany. To answer her research question, she interviewed four women aged 20, 28, 36 and 48 years who had come to Germany on different routes from Syria. Khazal used the **episodic interview** (see Chapter 11) with an interview guide comprising five topics – the interviewee and her experience as refugee; everyday life in Syria and Germany; the interviewee's understanding of emancipation; life in Syria and Germany and societal demands; and ideas about her future in and perspective on Germany. The data were analyzed using thematic **coding** (see Chapter 12). The results show specific understandings of the interviewed women and differences among them.

The participants in a study may experience the research situation as follows. They are involved in the study as individuals, and are expected to contribute their experiences and views from their particular life situations. There is scope for what they see as essential, for approaching questions differently and for providing different kinds of answers with different levels of detail. The research situation is designed more as a dialogue, in which probing, new aspects, and their own estimations find their place.

Figure 1.3 displays the various levels on which social research can approach a phenomenon under study. If we take failure in school exams as a phenomenon, we can use quantitative research and study distributions and **correlations** of this phenomenon in big samples, e.g. asking for differences in failure rates between small town and big city schools.

We can use qualitative methods to develop a theory or a typology based on smaller samples, asking participants for their experience of failing exams and subjective views about it. And, in a more radical way, we can do an empirical case study asking how one student experiences and explains failing school exams, what has led to this result and how the individual's life continues afterwards. This approach allows a detailed description and in-depth understanding of a case of failing, which can then be complemented by other case studies.

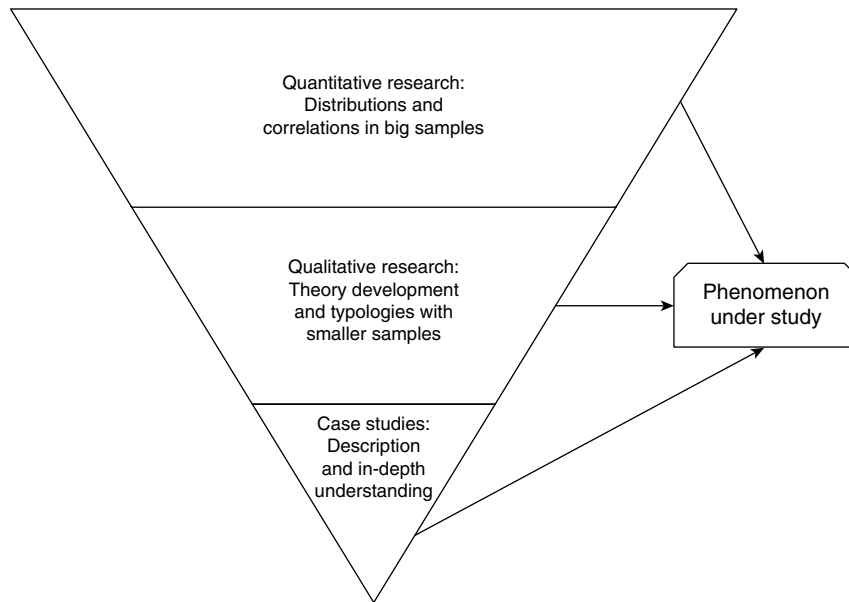


Figure 1.3 Levels of approaching a phenomenon under study

Differences between Quantitative and Qualitative Research

From the outlines of features of both approaches above, some of the main differences in assessing what is under study (issue, field and persons) have become evident. These are summarized in Table 1.3.

Table 1.3 Differences between quantitative and qualitative research

	Quantitative research	Qualitative research
Theory	As a starting point to be tested	As an end point to be developed
Case selection	Oriented on (statistical) representativeness, ideally random sampling	Purposive according to the theoretical fruitfulness of the case
Data collection	Standardized	Open
Analysis of data	Statistical	Interpretative
Generalization	In a statistical sense to the population	In a theoretical sense

Common Aspects of Quantitative and Qualitative Research

Despite the differences, the two approaches have some points in common. In both approaches, you:

- use, produce, and analyze data (see Chapters 10 to 12)
- work systematically by using empirical methods (see Chapters 11 and 12)
- aim at generalizing your findings – to situations other than the research situation and to persons other than participants in the study (see Chapter 13)
- pursue certain research questions, for which the selected methods should be appropriate (see Chapter 4)
- should answer these questions using a planned and systematic procedure (see Chapter 7)
- have to check your process of research for ethical acceptability and appropriateness (see Chapter 3)
- should be aware of the challenges of decolonizing methods and research (see below, this chapter)
- have to make your process of research transparent (i.e. understandable for the reader) in presenting the results and the ways that lead to them (see Chapter 14)

Advantages and Disadvantages

An advantage of quantitative research is that it allows for the study of a large number of cases for certain aspects in a relatively short time frame and its results have a high degree of **generalizability**. The disadvantage is that the aspects that are studied are not necessarily those that are relevant for participants and the context of the meanings for what is studied cannot be sufficiently taken into account.

An advantage of qualitative research is that detailed and exact analyses of a few cases can be produced, and participants have much more freedom to determine what is relevant for them and to present it in its contexts. The disadvantage is that these analyses often require a lot of time and you can generalize results to the wider population in only a very limited way.

Synergies and Combinations

The strengths and weaknesses just mentioned provide a basis for deciding which methodological alternative you should select for your specific research question (see Chapter 8). At the same time, we should remember that it is possible to combine qualitative and quantitative research (as is explored in more detail in Chapter 9) with the aim of compensating for the limitations and weaknesses of each approach and producing synergies between them.

DOING RESEARCH ON SITE, DOING IT ONLINE OR COMBINING THE TWO

In the last two decades or so, a new trend has arisen which has considerably extended the reach of social research. With the development of the Internet, both qualitative and quantitative approaches can now be used in new contexts.

Traditionally, interviews, surveys and observations (see Chapter 11) have mostly been done on site. You make appointments with your participants, meet them at a specific time and location, and interact with them face to face or send them your questionnaire by mail and they return it in the same way. This kind of research has its limitations. Sometimes, practical reasons will make these encounters difficult: participants live far away, are not ready to meet researchers, or are relevant for your study as members of a virtual community.

These limitations can sometimes be overcome if you decide to do your study online. Quantitative and qualitative methods have been adapted to online research. E-mail or online interviews, online surveys and virtual **ethnography** are now part of the methodological toolkit of social researchers. This means not so much (or, at least, not only) that you apply social science methods to study (the use of) the Internet, but rather that you use the Internet to apply your methods to answer your research questions. In particular, new forms of communication in the context of social media provide new options for doing social research. Even if studies are mainly conducted on site, the Internet can be a helpful tool and resource. In many cases, traditional forms of data such as interviews or surveys and digital data can be combined (Fielding, 2018). Digital and online methods also facilitate doing research collaboratively (see Chapters 8–12 for details).

NEW CHALLENGES: DIVERSITY AND DECOLONIZING SOCIAL RESEARCH

The history of science has for a long time been written with the focus on Western (European) science and the importance of individual researchers – with a focus on the geniuses such as Einstein, Newton, Darwin, or Copernicus and their discoveries and contribution to the development of science. The developments and contributions beyond that focus of what was to come – insights from Africa, Asia, Australasia and the Pacific – were largely ignored, or at least not acknowledged, as James Poskett (2022) has shown in great detail in a recent book on the global history of natural science and technology. In the context of the social sciences, this Western oriented focus on sciences lead to a domination of Western social sciences in research in the context of colonialization and the pushback of other forms of local knowledge.

As a more recent development, the discussion about decolonizing methodologies has implications for research methodology in several respects. Is it still adequate to export established methodologies developed against the background of a Western **epistemology** and concept of

knowledge to 'other' areas (see Hsiung, 2012, for the case of Asia, and Chilisa, 2020, for the conceptualization of Indigenous methodologies more broadly)? What is the impact on local knowledge – for example, in Maori cultures in New Zealand or First Nation cultures in Canada – when researchers come and reduce the role of Indigenous people to that of providers of data? Here, the request of 'Nothing about us without us' (e.g. Manokaran et al., 2020) illustrates the need for redefining the relations of researcher and the researched in this context. For Indigenous research, the following understanding of research is widely used:

Research: It is systematic, that is, it is the adoption of a strategy or a set of principles to study an issue of interest. The systematic strategy usually starts with the identification of an area of interest to study; a review of the literature to develop further understanding of the issue to be investigated; and choice of a research design or strategy that will inform the way the sampling of respondents is performed, the instruments for data collection, the analysis, interpretation, and reporting of the findings. (Chilisa, 2020, p. 5)

This shows that the starting points of Indigenous and Western research are not so fundamentally apart in social research. It is rather the ways in which this definition is applied that makes the difference and particular approach.

Discussions about decolonizing methods focus on social science methodologies more generally (Chilisa, 2020; Tuhiwai-Smith, 2021). Chilisa (2020, pp. 105–6) has summarized a number of limitations of dominant research methodologies from a **decolonizing research** perspective. She sees the role of imperialism, colonization and globalization in the construction of knowledge ignored and academic imperialism as dismissing and attempting 'to quash alternative theories, perspectives, or methodologies'. Methodological imperialism is based on 'a collection of methods, techniques, and rules that valorize the dominant culture'. Euro-Western languages are dominant in the construction of knowledge and 'unfavorable to former colonized societies and historically oppressed groups' (Chilisa, 2020, pp. 105–6).

Mainly, in this discussion it is argued that social science methods have been developed against the background of a Western epistemology and political traditions of colonization. These traditions have a specific impact if these methods are used in Indigenous research or non-Western contexts. Three consequences are drawn from these discussions: 1) Researchers, such as Chilisa (2020), Tuhiwai-Smith (2021) and Cram (2022) demand a stronger role for Indigenous people (such as the Maori people in New Zealand, for example) in Indigenous research and other communities beyond being mere participants providing data; 2) Tuhiwai-Smith (2021) argues that participants should be involved in both planning and doing the research and that it is only Indigenous people who should do research with and about Indigenous people. These discussions are very strongly felt issues in New Zealand-Maori, African and Asian contexts (Hsiung, 2012) as well as in Latin America; 3) Chilisa (2020) discusses Indigenous methodologies in detail and some Western researchers have started to question assumptions – about interviewing for example (Gobo, 2011) – and discuss decolonizing

approaches. Finally, we should consider the role qualitative research can play in these developments and the implications for approaches to qualitative research (see Schöngut-Grollmus & Energici, 2022). This may then become relevant for other communities as contexts of doing research with vulnerable groups, LGBT communities or in postcolonial studies and in European and North American contexts.

While these discussions are mainly focused on qualitative research, we find at least three approaches to decolonizing quantitative research: Hayward et al. (2021a) emphasize the need for Indigenous and decolonized **quantitative methods** in the health area; Zwiener-Collins et al. (2023) discuss an approach to decolonising quantitative research methods teaching in political sciences; and Walter and Andersen (2013) have presented a methodological approach to Indigenous statistics.

What does this mean for a contemporary book on research methodology? First, social research should be conducted with *diversity, equity and inclusion* in mind. This means ethnographies or interviewing, for example, should more fully take the following into account: 1) the diversity of participants and the situations in which they live; 2) the research situation, which should be constructed in such a way as to do justice to the target group and be characterized by evaluating the participants' needs and possible experience of discrimination; 3) the construction and application of social research methods so that all social groups and communities can be included in the practice of research – as participants but also as researchers.

TRANSPARENCY IN RESEARCH

The discourse around decolonization has made the limits of social research more transparent, previously not having acknowledged its history and roots in Western thinking. At the same time, there is a more extended discussion about the need for social research to become more transparent. Transparency was discussed in terms of the quality of qualitative research for quite some time before it became a hot topic more recently. The so-called replication crisis in psychological (experimental) research showed that several of its classical studies could not be reproduced with the same or at least similar results (see Stroebe & Strack, 2014). Although transparency and quality of research had not been associated with replication in qualitative research, it was affected by this discussion. Moravcsik (2019, p. 2) sees a transparency revolution under way across social sciences in general as publishers and funders, for example, press researchers 'to make their data, analysis, and methods public' (see Chapter 13).

WHY AND HOW RESEARCH CAN BE FUN

For many students, completing courses in research methods and statistics seems to be nothing more than an unpleasant duty; it seems you have to go through this, even if you do not know why and for what purpose. To learn methods can be exhausting and painful. If the whole

enterprise leads to a difficult written test at the end, sometimes any excitement is submerged by the stress of the exam. To apply methods can be time-consuming and challenging.

However, the systematic nature of the procedures and access to practical issues in empirical research in your studies and later in professional work (as a sociologist, social worker and the like) may provide new information. You may discover new insights in the analysis of your data. Interviews, life histories or **participant observation** can reveal much about actual life situations or about how institutions function. Sometimes these insights come as a surprise, which may give you the chance to overcome your prejudices and limited perspectives on how people live and work. And you will learn a lot about how life histories develop or about what happens in practical work in institutions or in the field.

In most research processes, you will learn a lot, not only about the participants but also about yourself – especially if you work with issues such as health, stress at university, the impact of social discrimination, etc. in real life situations. In particular, in the context of theoretically ambitious studies and their content, working with empirical data can form not only an instructive alternative or complement to theory but also a link between theory and everyday real-life problems.

Working with other people can be an enriching experience, and if you have the chance to do your research among a group of people – a research team or a group of students – it is a good way out of the isolation students sometimes experience. For many students, work with technical devices, computers, programs and data can be satisfying and a lot of fun. For example, using communication forms in social media for research purposes can provide new and up-to-date experiences of social networking in a professional way. And in the end you will have concrete products to hand: examples, results, what they have in common and how they are different for a variety of people, and so on.

Finally, to work on an empirical project requires working on one issue in a sustained way. This is good practice, given that many students' experiences today are characterized more by 'bits and pieces' work. Empirical research in your fields of study can also be a test of how much you like those fields. If the test ends positively, it can reassure you in your decision to become, for example, a social worker or a psychologist.

All in all, research experiences (such as selecting, accessing and interviewing or observing people) can provide experiences and insights that may help you in other, more practice-oriented fields of work after finishing your studies. To highlight this transferrable benefit of knowing about research, the research examples in this text are introduced as 'Research in the real world' throughout the chapters.

WHAT YOU NEED TO ASK YOURSELF

Knowledge about social research helps in two ways. It can provide the starting point and basis for doing your own empirical study, such as in the context of a thesis or of later professional work in sociology, education, social work, etc. And it is also necessary for

understanding and assessing existing research and perhaps for being able to build an argument on such research. For both, we can formulate a number of guideline questions, which allow a basic assessment of research (in the planning of your own or reading other researchers' studies). These are shown in Box 1.2.

Box 1.2 What you need to ask yourself

Understanding Social Research

- 1 What is studied exactly, what are the issues and what is the research question?
- 2 What steps have been taken to ensure that the research really investigates what is supposed to be studied? How has the study been planned, which design has been applied or constructed, and how have biases been prevented?
- 3 What is the population represented in what is studied? What claims are made about generalizing the findings and how are they fulfilled?
- 4 Is the execution of the study ethically sound and theoretically grounded? How are participants protected from any misuse of the data referring to them? What is the theoretical perspective of the study?
- 5 Which methodological claims are made and fulfilled? Which criteria are applied?
- 6 Does the presentation of results and of the ways they were produced make transparent for the reader how the results came about and how the researchers proceeded? Is the study transparent and consistent in its presentation?
- 7 Is the chosen procedure convincing? Are the design and methods appropriate for the issues under study?
- 8 Does the study achieve the degree of generalization that was expected?

These guideline questions can be asked regardless of the specific methodology that has been chosen and can be applied to the various methodological alternatives. They are relevant for both qualitative and quantitative studies and can be used for assessing a case study, as well as for a representative survey of the population of a country. They offer a framework for observations as well as for interviewing or for the use of existing data and documents (see Chapters 10 and 11 for more detail on this).

WHAT YOU NEED TO SUCCEED

This chapter should have given you a rough orientation in the field of social research. This should allow you to contextualize what the subsequent chapters will treat in more detail. This orientation should be a first step in helping you later to take on your own research and study. The following questions (see Box 1.3) should help you to check what to take home from this chapter for the steps you will take next.

Box 1.3 What you need to succeed

Understanding Social Research

- 1 Do I understand what social research is about?
- 2 Am I aware of the differences between scientific and everyday knowledge?
- 3 Do I see what can be reached with social research and what cannot?
- 4 Do I understand the differences between basic and applied research?
- 5 Do I have a rough idea about the differences between qualitative and quantitative research?
- 6 Do I see the common aspects of both forms of research?
- 7 Do I have some idea about when research should or could be done online and that this follows principles similar to other forms of social research?

What you have learned

- Social research is more systematic in its approach than everyday knowledge.
- Social research can have various tasks: research may be focused on knowledge, practice and consulting.
- Quantitative research and qualitative research offer different approaches. Each has strengths and limitations in what can be studied.
- Quantitative and qualitative research can complement each other.
- Both quantitative and qualitative research can be applied on site and online.
- We can identify common features across the various approaches.

What's next

The first text listed below provides a brief introduction and overview of quantitative research; the second book gives more insight into the variety of further detail on qualitative research methods:

Williams, M., Wiggins, R., & Vogt, P. (2022). *Beginning Quantitative Research*. London: Sage.
 Flick, U. (2023). *An Introduction to Qualitative Research* (7th edn). London: Sage.

The following two (open access) articles outline the need to do Indigenous and decolonized quantitative research and for decolonizing quantitative research methods training:

Hayward, A., Wodtke, L., Craft, A., Robin, T., Smylie, J., McConkey, S., Nychuk, A., Healy, C., Star, L., & Cidro, J. (2021a). Addressing the Need for Indigenous and Decolonized Quantitative Research Methods in Canada. *SSM – Population Health*, 15, 100899.
 Zwiener-Collins, N., Jafri, J., Saini, R., & Poulter, T. (2023). Decolonising Quantitative Research Methods Pedagogy: Teaching Contemporary Politics to Challenge Hierarchies from Data. *Politics*, 43 (1), 122–138. <https://doi.org/10.1177/02633957211041449>

This book informs about Indigenous methodologies and the role of qualitative, quantitative and mixed methods in them:

Chilisa, B. (2020). *Indigenous Research Methodologies* (2nd edn). London: Sage.

The following case study should give you an idea of how a relevant problem can be selected and turned into a research project. It is only meant to show what relevant research means and is a first orientation for what we address in more detail in the later chapters of the book:

Winters, K., & Carvalho, E. (2014). *The Qualitative Election Study of Britain: Qualitative Research Using Focus Groups*. *SAGE Research Methods Cases*. <https://doi.org/10.4135/978144627305013509945>