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UNLOCKING THE POTENTIAL OF QUALITATIVELY ORIENTED MIXED METHODS RESEARCH

ABSTRACT

The growing recognition of mixed methods research as a valuable approach to understanding our complex world, along with the emergence of hybrid designs, presents opportunities for prioritizing qualitative integration. Integration, the defining feature of mixed methods research, requires intentional and strategic efforts to generate novel insights by combining qualitative and quantitative approaches in various ways. In qualitatively oriented designs, integration plays a critical role in preserving and amplifying qualitative contributions, yet little guidance exists for researchers. While qualitatively oriented mixed methods research is widely recognized within the broader mixed methods field, defining its distinct niche remains underexplored. This paper, based on a keynote presented in the online component of the 9th World Conference on Qualitative Research, sheds light on the often overlooked potential of mixed methods designs that prioritize qualitative perspectives in their integration with quantitative research approaches. Central to our exploration is the fundamental question: What guides the design of qualitatively oriented mixed methods research? To that end, we examine the application of key mixed methods practices to help researchers bring integration to the forefront of their qualitatively oriented mixed methods designs. Using compelling examples and describing practical strategies, we provide guidance on leveraging qualitatively oriented mixed methods research as a distinct and valuable approach—enhancing methodological rigour and integration evidence. Researchers benefit from practical guidance, ensuring that the unique strengths of qualitative inquiry are both elevated and enhanced in mixed methods designs. Together, we unlock the potential of qualitatively oriented mixed methods to navigate and understand our intricately woven world.

Keywords

Mixed methods research; Integration; Qualitative research; Qualitatively oriented mixed methods research, Research teams.

1. Introducing the Potential of Qualitatively Oriented Mixed Methods Research

The prioritization of qualitative perspectives within mixed methods research is an intentional integration strategy for elevating and enhancing the unique strengths of qualitative inquiry. Integration, the defining feature of mixed methods research, requires intentional and strategic efforts to generate novel insights from combining qualitative and quantitative approaches in various ways. In qualitatively oriented designs, integration plays a critical role in preserving and amplifying qualitative contributions, yet the lack of practical guidance challenges researchers.

Qualitatively oriented mixed methods designs have long been known to offer great potential for researchers seeking to prioritize qualitative perspectives (Cameron, 2016; Morse & Cheek, 2014; Hesse-Biber, 2010; Onwuegbuzie & Poth, 2015). A qualitatively oriented mixed methods approach is distinctive by placing qualitative inquiry at the center of the research process. The quantitative elements serve a supportive role in complementing, enhancing, or contextualizing qualitative findings rather than the other way around. In doing so, qualitatively oriented mixed methods research offers unique opportunities for metainferences, yielding a rich understanding of human experiences. In this paper, I draw upon Hesse-Biber's (2018) astute definition and make explicit my own terminology preference despite the lack of a universal definition or even terminology as the literature is replete with various terms such as qualitative-driven, -prioritized, -emphasized, -oriented mixed methods:

An important dimension of any qualitatively driven mixed methods project is a commitment to privileging a qualitative approach over a quantitative approach in that the quantitative component (quan) takes a secondary role by prioritizing qualitatively driven epistemology and methodology as the core of the overall. (p. 6)

Qualitatively oriented mixed methods research is widely recognized within the broader mixed methods field, yet researchers can experience challenges locating examples within published literature (Archibald et al., 2015; Hesse-Biber, 2018; Morgan & Hoffman, 2021). Despite the increasing interest in qualitatively oriented mixed methods research, researchers often struggle with the lack of accessible examples and practical guidance. Without clear illustrations of how qualitatively oriented designs operate in practice, researchers may be discouraged from adopting this approach.

In my work, I am guided by the core requirements of qualitatively oriented mixed methods described by Morse and Cheek (2014) who refer to the qualitative priority to be evidenced in the study purpose, research questions and inductive process. Next, I describe how my use of qualitatively oriented mixed methods research has emerged.

2. My (Surprising?) Path as a Qualitatively Oriented Mixed Methods Researcher

There are days I hardly recognize who I was at the start of my research journey. Many are surprised to hear that I initially came to research from a quantitative perspective but as someone who was studying biology more than 30 years ago, I was initially introduced to the study of relationships among predetermined variables. When my research work began to involve the study of people, I soon became aware of and frustrated by the limitations of the data and the perspectives represented in the data I was collecting quantitatively. I continue with expanding my ways of knowing and consider myself as a ‘qualitative researcher in training’ with much to learn.

Over the last two decades, I have benefitted greatly from engaging with the emerging global community of mixed methods researchers. I appreciate my research communities because they recognize and value diverse ways of knowing and approaching research. This inclusivity likely stems from the presence of researchers who embrace both disciplinary and methodological pluralism. Today, I remain centered as a qualitative researcher and I have experienced integration as a powerful means to broaden the impact of my work. My first qualitatively oriented mixed methods design involved case studies which I justified to integrate quantitative data into my case descriptions. What happened surprised me because the integration of numbers did not dilute my rich descriptions.

In 2022, my colleague Dr. Peggy Shannon-Baker and I set out to distinguish the unique niche of qualitatively oriented mixed methods research designs (Poth & Shannon-Baker, 2022). I don’t claim this work as all-encompassing but rather as a starting place. It helped me begin to articulate the purposes for which I considered a qualitatively oriented mixed methods research design to be appropriate. Importantly, in this paper, I provide practical guidance for navigating the emergent and nonlinear design process involved in qualitatively oriented mixed methods research. Around the same time, as editor of the *Sage Handbook of Mixed Methods Research Design* (Poth, 2023), I sought to elevate the many examples of qualitatively oriented mixed methods designs across the 36 chapters involving more than 80 contributors from 16 countries around the world. From this work, I see great potential for applying theories such as participatory and community-based research approaches in mixed methods research that prioritizes qualitative perspectives to realize reciprocal relationships with participants. I have witnessed qualitatively oriented mixed methods insights empowering communities to amplify their voices and experiences in new ways. A whole section of the handbook was dedicated to stories of researchers navigating cultures in mixed methods research which helps broaden our understanding of how researchers are embracing more culturally-centered ways of mixed methods research.

Today, I see so much potential for innovative combinations of emerging and established qualitative methods in combination with quantitative trends, as I have seen qualitatively oriented mixed methods research resonate with diverse audiences.

I see a couple of emerging terminologies to keep an eye out for, including intersections of qualitative approaches with mixed methods and the use of hybrid to refer to combinations of different approaches. I believe there are many designs to come that we have not yet imagined.

3. A Tapestry as a Helpful Metaphor for Distinguishing the Niche of Qualitatively Oriented Mixed Methods Research

I find the metaphor of a tapestry to be useful for conveying the niche for qualitative oriented mixed methods. Recognized as the oldest form of woven textile, tapestry is similar to research in that it can take many forms and benefits from the creativity of the maker.

Let's imagine a research problem as a tapestry where each thread represents a different element of the problem being pursued with mixed methods, perhaps the culture in which it's situated, the influences of technology, economics, politics, and social ecosystems. Each thread is interwoven with others in ways that create patterns both beautiful and perplexing. Now imagine trying to understand this tapestry by pulling out or following just one thread, or even a few, without recognizing how they connect, without appreciating the rich texture formed by their interconnectedness. It is this richness that I believe a qualitative orientation offers to mixed methods research. It might also be what draws researchers to qualitatively oriented designs who might not otherwise consider mixed methods. The metaphor also helps us to understand the responsibilities we assume as researchers to approach this tapestry with care, respect, and curiosity. Our role is not just to extract isolated pieces or understandings but to engage with the full complexity of what we're studying, or at least to the fullest we can, to listen to the diverse voices and perspectives, represent the varied collective and individual experiences, and weave together our contextual understandings of what shapes the phenomena under study.

A recent study of literacy gaps in children serves as an illustrative example where we, as an interdisciplinary research team, sought to prioritize the experiences of school staff to generate understandings of successful classroom strategies (Kierstead et al., 2023). We used data from reading assessments in several ways that were new to the team members: to identify teachers whose classes has increased student reading scores in ways that were unexpected, as prompts in the interviews to query their perspectives of what the student data trends might suggest in relation to their classroom practices and observations, and as evidence for student impact of classroom strategies. It is important to note that we prioritized the lived experiences and qualitative data that was generated by these efforts in our integration of the student scores and generated outcomes that would not have been possible with either qualitative or quantitative perspectives alone. Thus, I see mixed methods not as a compromise but as a way to safeguard and elevate the qualitative richness I care so deeply about in my work. It can also be a great vehicle for introducing and advocating for the value of qualitative research to those who might not be familiar.

In a subsequent methodological-focused article we wrote about our experiences as an interdisciplinary research team as a way of distinguishing how integrative teamwork is necessary to achieve outcomes beyond the sum of collective efforts (Poth et al., 2024). We described how team members benefit from being attentive listeners and responsive to conversations that are leading to new understandings beyond what could have been achieved by individuals. As we experienced, this was not easy work, especially under time constraints. Our experience of continual adjustments in our procedures and expectations challenged the ways in which we worked together and yet were necessary for us to achieve our prioritized qualitative integration. It also served to inspired one of our quantitatively oriented research team members who had admitted that they would never have had otherwise considered qualitative research. For me, my qualitatively oriented mixed methods research experiences continue to shape and reshape my identity as a researcher. It has deepened how I explore the intricate tapestry of society—one that continues to intrigue and challenge me.

4. Key Qualitatively Oriented Mixed Methods Research Practices

An opportunity to be a featured speaker at a health conference in Brazil during spring of 2024 led me to collaborate on a forthcoming publication involving an international team of researchers (Fabregues et al., in press). The article aimed to provide an essential reference of practices for designing and conducting mixed methods research with integration at the forefront. Here, I extrapolate these key practices to qualitatively oriented mixed methods research:

- Adopting a mixed methods mindset centers integration as an intentional activity. For qualitatively oriented mixed methods research this involves planning for integration to play a critical role in preserving and amplifying qualitative contributions at the design stage and throughout the preparation of fieldwork, analysis, and reporting.
- Identifying an integration-focused research problem that is appropriate for mixed methods. For qualitatively oriented mixed methods research this means making the case for the need for prioritized qualitative integration to address the problem.
- Formulating study aims and mixed methods research questions on the basis of your mixed methods rationale involves specifying the purpose of integration. For qualitatively oriented mixed methods research this means identifying what prioritizing qualitative will bring to the integrated outcomes.
- Selecting a mixed methods design to address your mixed methods rationale involves describing how integration will occur – that is when, how, and where qualitatively oriented mixed methods research this means describing the procedures guiding a prioritized qualitative orientation

- Implementing your quantitative and qualitative data procedures according to established standards of rigour involves presenting evidence of robustness for the elements involved in integration. For qualitatively oriented mixed methods research this means using rigorous qualitative procedures while integrating quantitative data in a way that supports the qualitative focus.
- Integrating at one or more stages of the study makes clear when the prioritized qualitative integration will take place. For qualitatively oriented mixed methods research this means that integration can occur at various stages in the research process including at the design, data collection, analysis and interpretation stages.
- Generating and discussing meta-inferences involves detailing unique insights from integration. For qualitatively oriented mixed methods research this means representing evidence and interpretations that prioritize the qualitative insights.
- Communicating evidence of integration. For qualitatively oriented mixed methods research this involves clearly articulating how the prioritized qualitative integration was achieved to ensure methodological transparency.

5. Final Words

As the field of mixed methods research and its integration practices continues to evolve, I expect we will see many qualitatively oriented mixed methods research practice advancements. I continue to advocate for identifying qualitatively oriented mixed methods research in publication titles, abstracts, keywords and methods descriptions so they can be more easily recognized. In addition, if researchers can be more explicit about the benefits of qualitatively oriented mixed methods research, then we can better make its case as a valuable approach for understanding our complex world. Finally, methodological rigour in qualitatively oriented mixed methods research can be aided by detailed accounts of design and procedural decisions which can span both empirical and methodologically-oriented publications to share our work and lessons for others to learn from.

In a world as complex and interconnected as ours, I invite you to reflect on your own research journey. To what extent might qualitatively oriented mixed methods research help you amplify your impact, broaden your reach, and enhance your relevance in tackling today's most pressing challenges. By integrating the richness of qualitative insights with the quantitative findings, we can move beyond isolated perspectives to offer a more holistic and tapestry-like understanding of the human experience and our shared environments. More importantly, a qualitatively oriented mixed methods research approach encourages reciprocity with those who are involved in the research. This is not just about methodology; it's about fulfilling our responsibility as researchers to approach our work thoughtfully, ethically, and with purpose—so that our insights truly resonate with, serve, and empower the communities we study using qualitatively oriented mixed methods research.

So, where your next research journey will take you?

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