# Qualitative research methods: when to use them and how to judge them質性研究方法：何時使用以及如何判斷

<https://academic.oup.com/humrep/article/31/3/498/2384737>

## "Research that uses qualitative methods is not, as it seems sometimes to be represented, the easy option, nor is it a collation of anecdotes. It usually involves a complex theoretical or philosophical framework. Rigorous analysis is conducted without the aid of straightforward mathematical rules."

### 使用質化方法的研究，並非如有時被呈現般，僅是較為容易的選項，也不是僅將一些軼事瑣碎的整理。它通常**涉及複雜的理論或哲學架構，且在沒有明確數學規則協助下，仍須進行嚴謹的分析**。

## "Quantitative studies generally involve the systematic collection of data about a phenomenon, using standardized measures and statistical analysis. In contrast, qualitative studies involve the systematic collection, organization, description and interpretation of textual, verbal or visual data. The particular approach taken determines to a certain extent the criteria used for judging the quality of the report."

### **量化研究通常涉及使用標準化的測量工具與統計分析**，對某個現象進行系統化的資料蒐集。相對而言，**質化研究則涉及對文本、口語或視覺資料的系統化蒐集、整理、描述和詮釋**。所採取的特定研究途徑，在一定程度上決定了用於判斷研究報告品質的標準。

## "Caution must be exercised to ensure that a commitment to saturation does not assume an 'essence' of an experience in which limited diversity is anticipated; each account is likely to be subtly different and each 'sample' will contribute to knowledge without telling the whole story. Increasingly, it is expected that researchers will report the kind of saturation they have applied and their criteria for recognising its achievement; an assessor will need to judge whether the choice is appropriate and consistent with the theoretical context within which the research has been conducted."

### 必須謹慎注意，確保研究中追求的「飽和（saturation）」並未假設經驗具有某種固定的「本質（essence）」，即預期多樣性受限；**每一個敘述可能都存在些微的差異，每一個樣本都能對知識有所貢獻**，但無法呈現完整故事。研究者愈來愈被期望報告他們所應用飽和的種類，以及認定其達成的標準；而審查者則需判斷這樣的選擇是否適切且與研究所進行的理論背景相符。

# Qualitative case study methodology: Study design and implementation for novice researchers定性案例研究方法：針對新手研究人員的研究設計和實施

<https://www.academia.edu/download/40131683/case_study_ecmple.pdf>

## Qualitative case study methodology provides tools for researchers to **study complex phenomena within their contexts**.

### 質性個案研究方法為研究人員提供了在**其背景下研究複雜現象**的工具。

## This qualitative case study is an approach to research that facilitates exploration of a phenomenon within its context using a variety of data sources.

### 這種質性個案研究是一種研究方法，它**有助於利用各種資料來源來探索某一現像在其背景下的發展**。

## Potential data sources may include, but are not limited to: documentation, archival records, interviews, physical artifacts, direct observations, and participant-observation. Unique in comparison to other qualitative approaches, **within case study research,** investigators can collect and integrate quantitative survey data, which facilitates reaching a holistic understanding of the phenomenon being studied. In case study, data from these multiple sources are then converged in the analysis process rather than handled individually. Each data source is one piece of the “puzzle,” with each piece contributing to the researcher’s understanding of the whole phenomenon. This convergence adds strength to the findings as the various strands of data are braided together to promote a greater understanding of the case

### 資料來源：潛在資料來源可能包括但不限於：文件、檔案記錄、訪談、實物、直接觀察和參與者觀察。與其他定性方法相比，**個案研究的獨特之處在於，研究人員可以收集和整合定量調查數據，從而有助於全面了解所研究的現象。**在案例研究中，這些**多個來源的數據在分析過程中被聚合在一起，而不是單獨處理。每個資料來源都是「拼圖」的一塊，每一塊都有助於研究人員理解整個現象。**這種融合增強了調查結果的可信度，因為各種數據線索交織在一起，有助於更深入地了解案件狀況。 儘管從各種來源收集資料的機會非常有吸引力，因為這種方法可能非常嚴謹，但也存在危險。**其中之一就是收集大量需要管理和分析的數據。研究人員常常發現自己在數據中「迷失」。**為了使資料收集有序化，通常需要電腦化的資料庫來組織和管理大量資料。

it allows the researcher to explore individuals or organizations, simple through complex interventions, relationships, communities, or programs (Yin, 2003)

它允許研究人員探索個人或組織，從簡單到複雜的干預、關係、社區或計劃（Yin，2003）

## Rather, the researcher must ensure that the data are converged in an attempt to understand the overall case, not the various parts of the case, or the contributing factors that influence the case. As a novice researcher, one strategy that will ensure that you remain true to the original case is to involve other research team members in the analysis phase and to ask them to provide feedback on your ability to integrate the data sources in an attempt to answer the research questions.

### 不同於量化研究將資料從複雜到單一的抽絲剝繭分析，個案研究相反，**研究人員必須確保資料匯聚，以便了解整體案例(個案)，而不是個案的各個部分或影響案例的因素。**作為新手研究員，確保忠實於原始案例的策略之一是讓其他研究團隊成員參與分析階段，並請他們就您整合資料來源以嘗試回答研究問題的能力提供回饋。

## It is difficult to report the findings in a concise manner, and yet it is the researcher’s responsibility to convert a complex phenomenon into a format that is readily understood by the reader. The goal of the report is to describe the study in such a comprehensive manner as to enable the reader to feel as if they had been an active participant in the research and can determine whether or not the study findings could be applied to their own situation.

### 以簡潔的方式報告研究結果很困難，但研究人員有責任將複雜的現象轉換成讀者容易理解的格式。報告的目的是以全面的方式描述研究，使讀者感覺自己是研究的積極參與者，並能確定研究結果是否可以應用於自己的情況。

The collection and comparison of this data enhances data quality based on the principles of idea convergence and the confirmation of findings (Knafl & Breitmayer, 1989).

資料來源、資料類型或研究人員的三角測量是一種可用的主要策略，它可以支援案例研究中從多個角度觀察和探索現象的原則。這些資料的收集和比較可以根據思想融合和結果確認的原則來提高資料品質 (Knafl & Breitmayer, 1989)

# Case study research: Design and methods 個案研究：設計與方法

<https://books.google.com.tw/books?hl=zh-TW&lr=&id=FzawIAdilHkC&oi=fnd&pg=PR1&ots=l-1Q1apQ0w&sig=dBWgsMOkyVdbT-R_zevACYrZDQ0&redir_esc=y#v=onepage&q&f=false>

## As a research strategy, the case study is used in many situations to contribute to our knowledge of individual, group, organizational, social, political, and related phenomena."

### 個案研究在許多情境中用於貢獻對個人、群體、組織、社會、政治等相關現象的知識。

## "The case study inquiry

## copes with the technically distinctive situation in which there will be many more variables of interest than data points, and as one result

## relies on multiple sources of evidence, with data needing to converge in a triangulating fashion, and as another result

## benefits from the prior development of theoretical propositions to guide data collection and analysis."

### 個案研究探討：

### 能處理在技術上獨特的情境，此情境中的感興趣變數通常遠多於資料點的數量，因此：需要仰賴多種不同來源的證據，資料需要以三角驗證triangulation的方式加以匯聚，以及能夠受益於事先發展的理論命題，用以指導資料蒐集和資料分析的過程。

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## A case study is an empirical inquiry that investigates a contemporary phenomenon within its real-life context, especially when the boundaries between phenomenon and context are not clearly evident

### 個案研究是一種實證性的探究，特別是用來調查現實生活脈絡下的當代現象，尤其當現象與情境之間的界線不明顯時。

## The case study's unique strength is its ability to deal with a full variety of evidence—documents, artifacts, interviews, and observations—beyond what might be available in a conventional historical study

### 個案研究的獨特優勢在於它能夠處理多種不同類型的證據——文件、人工製品、訪談與觀察等，這些資料來源往往超越了傳統歷史研究可能取得的內容。

## Multiple-case designs have distinct advantages and disadvantages in comparison with single-case designs. The evidence from multiple cases is often considered more compelling, and the overall study is therefore regarded as being more robust

### 與單一個案設計相比，多重個案設計有其獨特的優點和缺點。從多個案例獲得的證據通常被認為更具說服力，因此整體研究更具說服力、更為穩健。

「質化研究旨在探討決策制定的原因與方法，而非僅止於探討什麼、哪裡及何時。因此，通常需要的是較小但更加聚焦的樣本，而非大規模樣本。

「量化研究通常透過統計方式評估數值資料，旨在利用大量樣本及結構化資料蒐集方法，描述或預測變數之間的關係。

質化研究適用於探究經驗、認知與動機，強調深入理解與脈絡；而量化研究則用於驗證假設、建立因果關係與一般化結果。

# Qualitative v/s. quantitative research-a summarized review 定性 v/s。量化研究－綜述

<https://www.academia.edu/download/94871634/Sharique_Ahmed_--_FINAL.pdf>

## Qualitative research is a process of naturalistic inquiry that seeks an in-depth understanding of social phenomena within their natural setting. It focuses on the"why" rather than the "what" of social phenomena and relies on the direct experiences of human beings as meaning-making agents in their everyday lives. Rather than by logical and statistical procedures, qualitative researchers use multiple systems of inquiry for the study of human phenomena including biography, case study, historical analysis, discourse analysis, ethnography, grounded theory, and phenomenology.

### 質性研究是一種自然探究的過程，旨在深入了解自然環境中的社會現象。它關注的是社會現象的“為什麼”而不是“是什麼”，並依賴人類作為日常生活中意義建構主體的直接經驗。質性研究者不採用邏輯和統計程序，而是使用多種探究系統來研究人類現象，包括傳記、案例研究、歷史分析、話語分析、人類學、紮根理論和現象學。

## The collection of quantitative information allows researchers to conduct simple to extremely sophisticated statistical analyses that aggregate the data. Quantitative research includes methodologies such as questionnaires, structured observations or experiments and stands in contrast to qualitative research. Qualitative research involves the collection and analysis of narratives and/or open-ended observations through methodologies such as interviews, focus groups or ethnographies. The purpose of quantitative research is to generate knowledge and create understanding about the social world. Quantitative research is used by social scientists, including communication researchers, to observe phenomena or occurrences affecting individuals. Social scientists are concerned with the study of people. Quantitative research is a way to learn about a particular group of people, known as a sample population. Using scientific inquiry, quantitative research relies on data that are observed or measured to examine questions about the sample population

### 定量資訊的收集使研究人員能夠進行從簡單到極其複雜的統計分析來匯總數據。量化研究包括問卷調查、結構化觀察或實驗等方法，與質性研究形成對比。質性研究涉及透過訪談、焦點小組或民族誌等方法收集和分析敘述和/或開放式觀察。定量研究的目的是產生知識並增進對社會世界的理解。 社會科學家（包括傳播研究人員）使用定量研究來觀察影響個人的現像或事件。社會科學家關心的是人的研究。定量研究是了解特定人群（稱為樣本人群）的一種方法。量化研究採用科學探究的方式，並依賴觀察或測量的資料來檢驗有關樣本群體的問題。

## How to Get Qualitative Data There are many methods you can use to conduct qualitative research that will get you richly detailed information on your topic of interest. Interviews- One-on-one conversations that go deep into the topic at hand. Case Studies- Collections of client stories from in-depth interviews. Expert Opinions- High-quality information from well- informed sources. Focus Groups- In-person or online conversation with small groups of people to listen to their views on a product or topic. Open-ended Survey Questions. A text box in a survey that lets the respondent express their thoughts on the matter at hand freely. Observational Research. Observing people during the course of their habitual routines to understand how they interact with a product, for example

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### 如何取得定性數據 您可以使用多種方法進行定性研究，從而獲得有關您感興趣的主題的豐富詳細資訊。訪談－深入探討當前主題的一對一對話。  個案研究－透過深入訪談收集客戶故事。  專家意見－來自消息靈通來源的高品質資訊。  焦點小組－與小群人面對面或線上對話，聽取他們對某個產品或話題的看法。  開放式調查問題。調查中的一個文字框，讓受訪者自由表達對當前問題的想法。  觀察性研究。例如，在人們的日常活動中觀察他們，以了解他們如何與產品互動。

## Although the quantitative and qualitative approaches to research are different, they can be complementary when used together; e.g., a researcher may conduct a focus group first to aid in the development of an instrument such as a survey. On the other hand, a researcher who completes a quantitative analysis may choose to look more in depth at a particular trend or phenomenon that was discovered during the data analysis and/or interpretation phases. Researchers may also use techniques from both traditions simultaneously. For example, a researcher might decide to conduct a content analysis of an online forum and quantitatively analyse data obtained from a survey instrument. Using mixed methods is a good way of employing triangulation, particularly “methodological triangulation.”7 It will be up to you, the researcher, and your advisor to decide as to which methods will work best for your research questions and goals. It is important that you understand that you are not locked into using one tradition or the other when writing your thesis or dissertation, and both are valuable

### 雖然定量和定性的研究方法不同，但一起使用時可以起到互補的作用；例如，研究人員可能會先進行焦點小組討論，以協助開發調查等工具。另一方面，完成定量分析的研究人員可能會選擇更深入地研究在數據分析和/或解釋階段發現的特定趨勢或現象。研究人員還可以同時使用兩種傳統的技術。例如研究人員可能決定對線上論壇進行內容分析，並對從調查工具獲得的數據進行定量分析。使用混合方法是運用三角測量的好方法，特別是「方法三角測量」。重要的是，您要明白，在撰寫論文或學位論文時，您不必局限於使用其中一種傳統，兩者都很有價值。

# [深度訪談在質性研究中的應用](https://student.hlc.edu.tw/action/file/51/20211008115321100.pdf)

### 透過這些面向進行反覆的探討，一方面貫串時間的縱列及兼顧廣度的橫軸，另一方面亦可由經緯全面的透析真象。

### 深度訪談後經過仔細整理後得到逐字稿，接下來就是資料分析的工作，基本上是循著描述、分析、解釋等方向，分析資料方法之一的紮根理論則除了前述三個功用外，更能進一步建構理論，紮根理論主要是著眼於資料本身，以科學的方法，逐步由資料中發覺出有用的型態，並且在歸類，比較，再歸類的程序循環中，直到再也沒有新概念出現就停止這個程序，以便建立初步的理論。

### 接下來，針對訪談稿的描述、解釋、建立理論等，可以採用紮根理論，主要的程序包括針對訪談逐字稿進行開放編碼，以產生概念化進一步歸納出類別，再根據屬性及面向再做發展，分化拆解出次類別，接著是主軸編碼，沿著屬性與面向上的直線以連結類別與次類別，接著是選譯編碼，以統整及精鍊理論，由一個核心概念組織起來，勾勒出理論架構，著手去精鍊理論、修剪多餘概念、補足未充分發展的類別等，接著是歷程編碼，進行整個編碼歷程的檢驗等，以發展出暫時性的理論。

### 此外，紮根理論比較適合用於自己熟悉的領域，不過，最好是同一領域的不同主題，並且適合用在未成熟的探索性問題。使用紮根理論最大的好處是，能採用科學的方法來建構理論，是質性研究中最符合科學典範之一。研究者對所研究的主題必須先擁有理論敏感度，也就是對研究主題有一個相當清楚的了解，將逐字稿的資料打散，依據屬性再找類別、次類別，針對逐字稿，經過一層一層不斷的深入，持績歸類、分析、整理出，更具象的概念，主題，並且發展出架構與理論。

# [Qualitative case studies.](https://awspntest.apa.org/record/2008-06339-004)

## For a research community, case study optimizes understanding by pursuing scholarly research questions. It gains credibility by thoroughly triangulating the descriptions and interpretations, not just in a single step but continuously throughout the period of study. For a qualitative research community, case study concentrates on experiential knowledge of the case and close attention to the influence of its social, political, and other contexts. For almost any audience, optimizing understanding of the case requires meticulous attention to its activities.

### 個案研究透過探究學術研究問題來優化理解。它透過徹底地對描述和解釋進行三角測量來獲得可信度，不僅僅是在一個步驟中，而且是在整個研究期間持續不斷地進行。對於質性研究界來說，個案研究集中在個案的經驗知識，並密切關注其社會、政治和其他背景的影響。對於幾乎所有觀眾來說，優化對案例的理解都需要細緻關注其活動。

# [Case study research](https://link.springer.com/content/pdf/10.1007/978-3-030-85124-8_7?pdf=chapter%20toc)

## Summary: Case Study as Methodology and Method

## Qualitative research, in general, has been viewed from many perspectives as being complex, messy and altogether confusing. “Case study” refers to both a specific research design, or methodology, and a method of analysis for examining a problem. While not conducive to generalization, in many cases, a sense of paradox between the particular and the generalizable is central to case study research. Case study research may examine an individual person, place, event, organization, action, phenomenon, or other type of subject, existing in a specific time and place. While case studies may examine a single subject of analysis, they may also be designed as comparative investigations that reveal relationships between two or more subjects or topics. Case studies have held an important position with regard to many disciplines and professions, ranging from psychology, anthropology, sociology, and political science to education, clinical science, social work and administrative science.

### 摘要：個案研究作為方法論與研究方法

### 質化研究普遍被認為是複雜、混亂且令人感到困惑的。「個案研究（case study）」既指一種特定的研究設計（研究方法論），也指分析特定問題的方法（研究方法）。雖然個案研究不利於進行一般化推論，但在許多情況下，個別特殊性與可概括性（普遍性）之間的矛盾感，是個案研究的核心所在。

### 個案研究能夠探討個別的人、地點、事件、組織、行動、現象或其他類型的研究主題，並將之置於特定的時間與空間脈絡之下加以分析。此外，儘管個案研究可能只分析單一主題，但也可以設計為比較性的研究，透過兩個以上的主題或議題的比較，揭露彼此間的關聯性。

### 個案研究在諸多學科與專業領域中佔據重要的地位，這些領域涵蓋心理學、人類學、社會學、政治學，乃至教育、臨床科學、社會工作及行政管理科學。