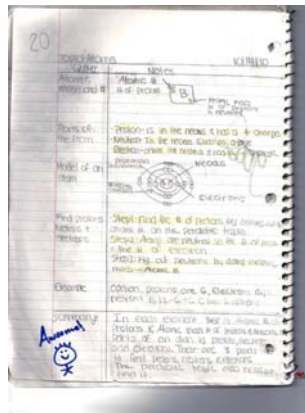


# From Codes to Conclusions: Strategies for Analyzing Qualitative Data

Lindsay Bayham

Department of Sociology, UC-Berkeley

January 18<sup>th</sup>, 2018



## Article Title

John Smith, University of California

Here is some sample text to show the layout of the introductory paragraph of this template article. The color and fontweight of the text can be modified in the preamble of this document.

### Section 1

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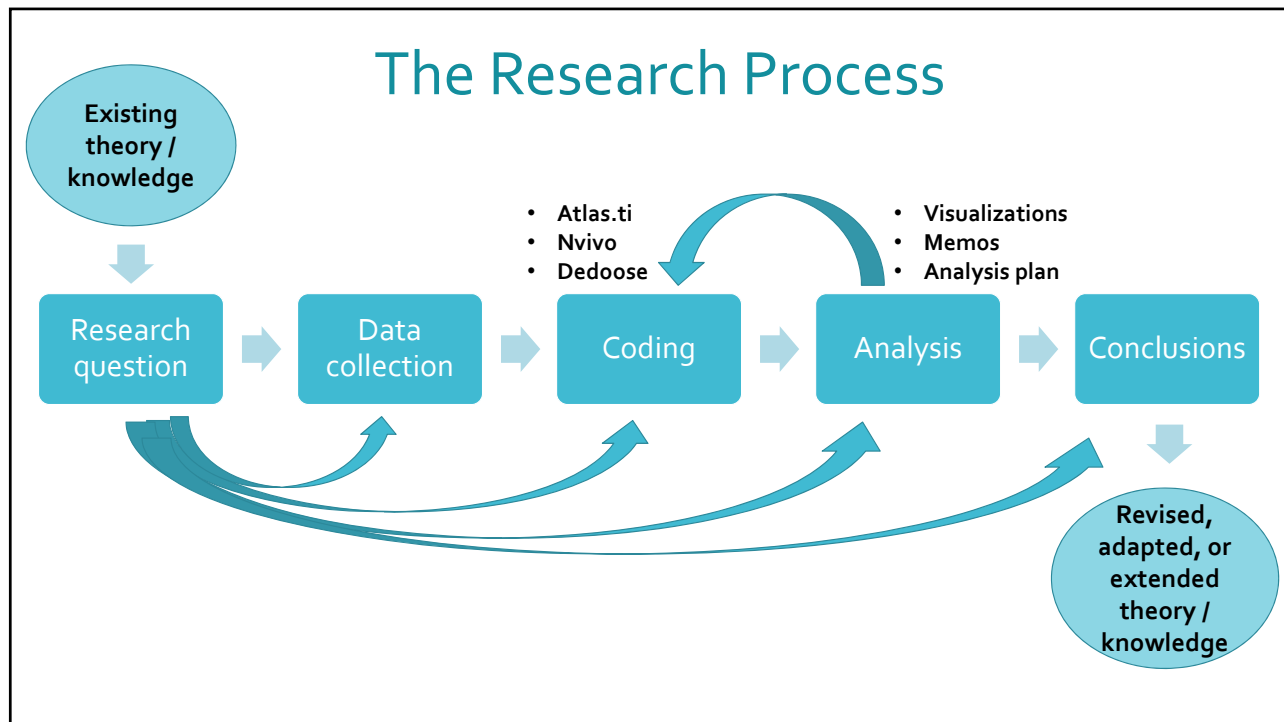
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### Subsection 1

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Step 1:  
Research  
question(s)

What are you trying to learn after doing this research?

Research questions can be:

- **deductive** (testing a defined hypothesis)
- **inductive** (discovering new relationships/categories/phenomena or generating new ideas from the data)

In both cases, you build upon existing research!

# AFRICA RISING

## Investors bet on the world's newest middle class

Hailey Lee | @haileylee139  
Monday, 22 Dec 2014 | 5:00 AM ET  
CNBC

### The rise of the middle class



3 August 2015

### Africa Rising: Now Is the Time to Invest in the World's Fastest-Growing Continent

Facebook, Twitter, LinkedIn, Email icons

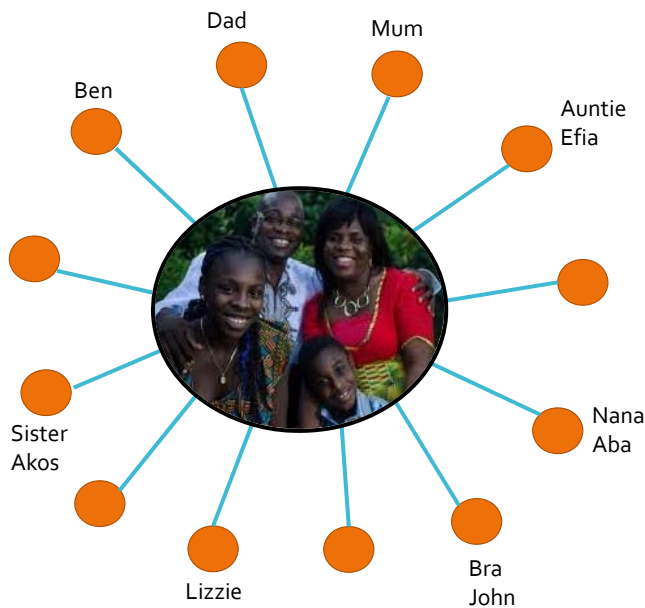
By Lauren Foster

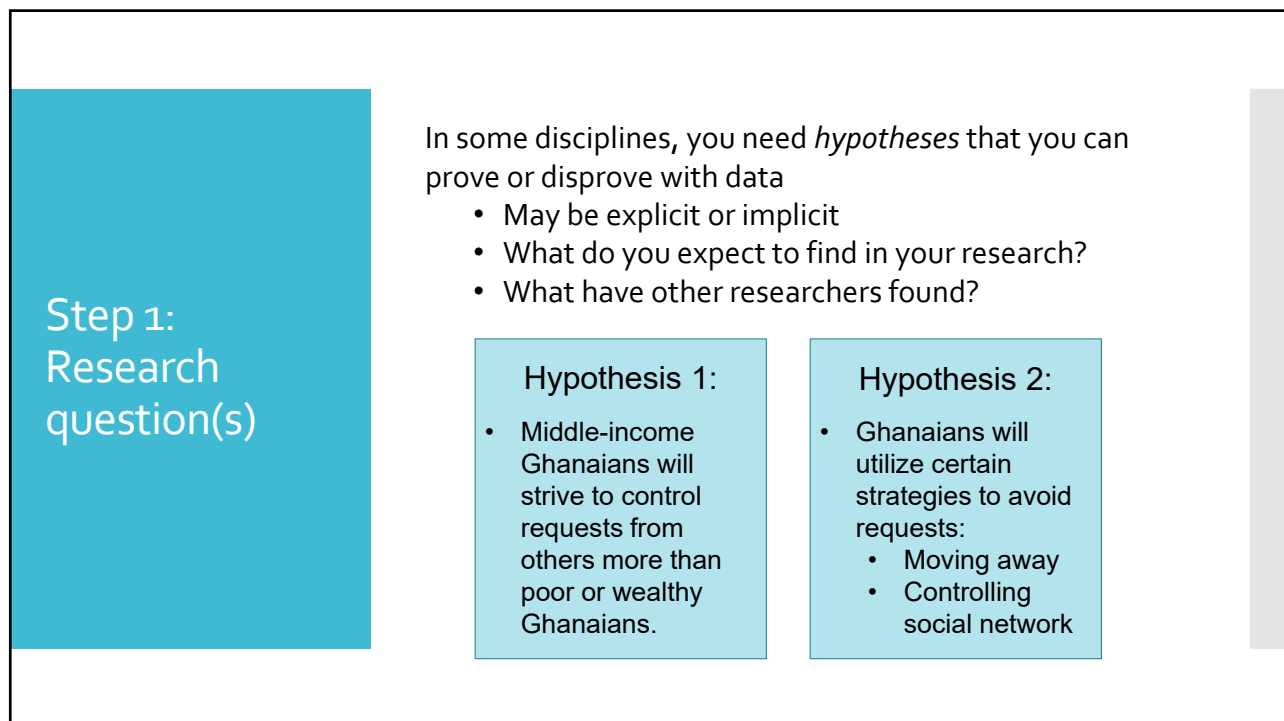
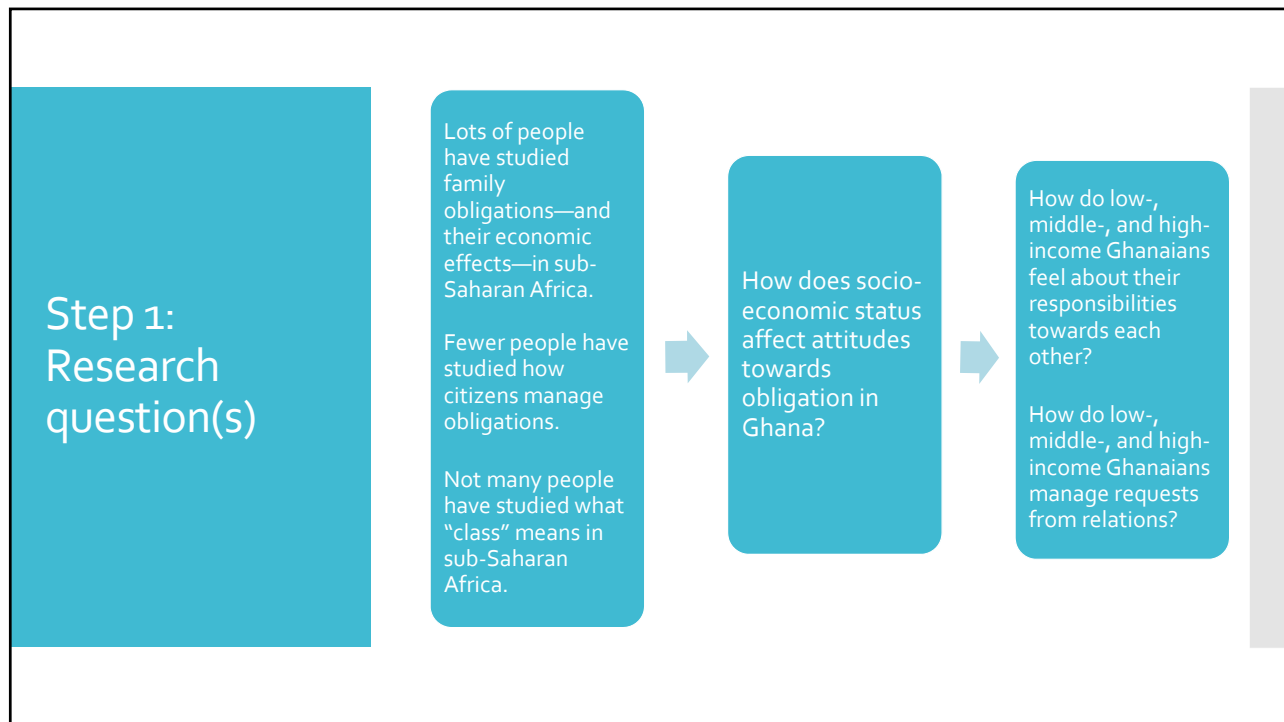
Categories: Equity Investments, Portfolio Management



These days, oil, cocoa and precious metals aren't the only things that are attracting foreign investors to Africa.

A middle class has formed on the continent, and it's transforming Africa's investment landscape, according to experts. Instead of focusing on extracting commodities, investors are shifting gears to take advantage of Africa's increasing consumer demand.





## Step 2: Collect qualitative data

- Ethnographic field notes
- Interview transcripts
- Focus group transcripts
- Video or audio recordings
- Archival data
- Open-ended survey data
- Meeting transcripts
- Organizational documents
- Court proceedings
- Newspapers



## Step 3: Code your data

### What is "coding"?

- Categorizing and organizing data: breaking it down into analyzable parts
- Identifying ideas and concepts in your data that may apply across your different sources
- Can be done manually or using various computer tools
  - MaxQDA
  - Atlas.ti
  - Dedoose
  - NVivo

## Step 3: Code your data

- Codes can be **deductive** or **inductive**

### *Emerge from the literature:*

- Avoiding requests
- Reciprocity
- Risk/uncertainty
- Inheritance

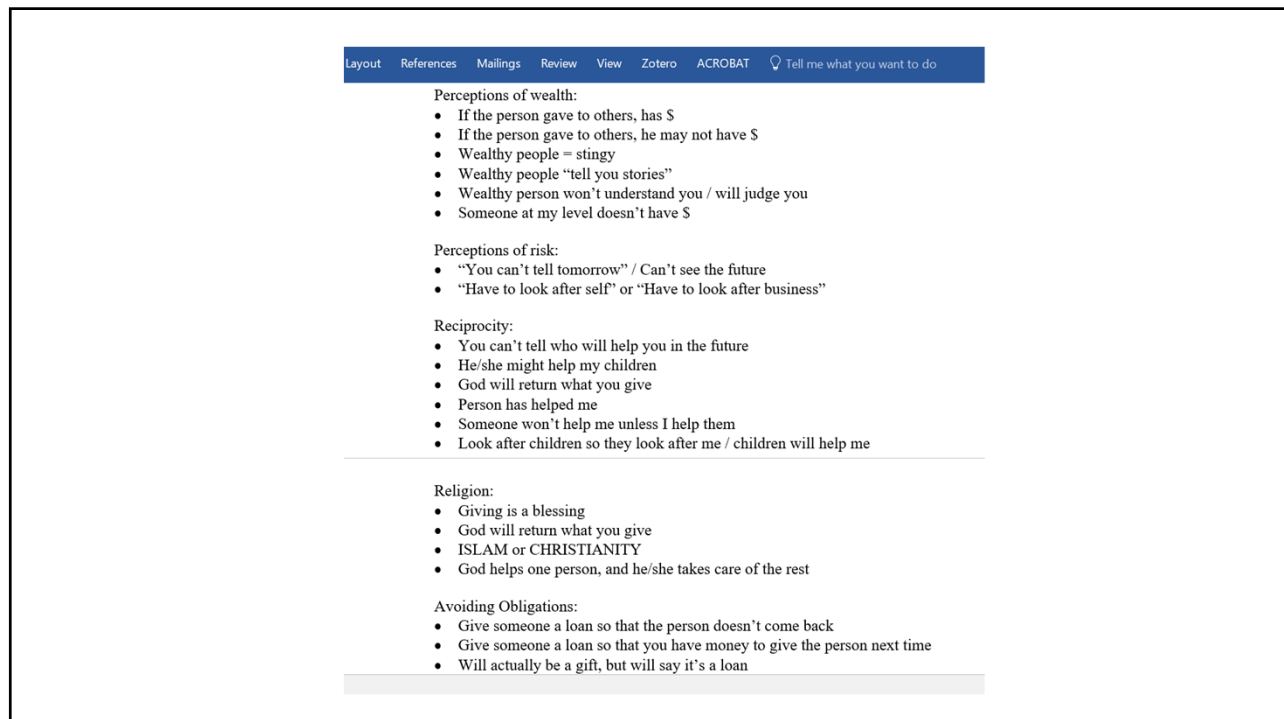
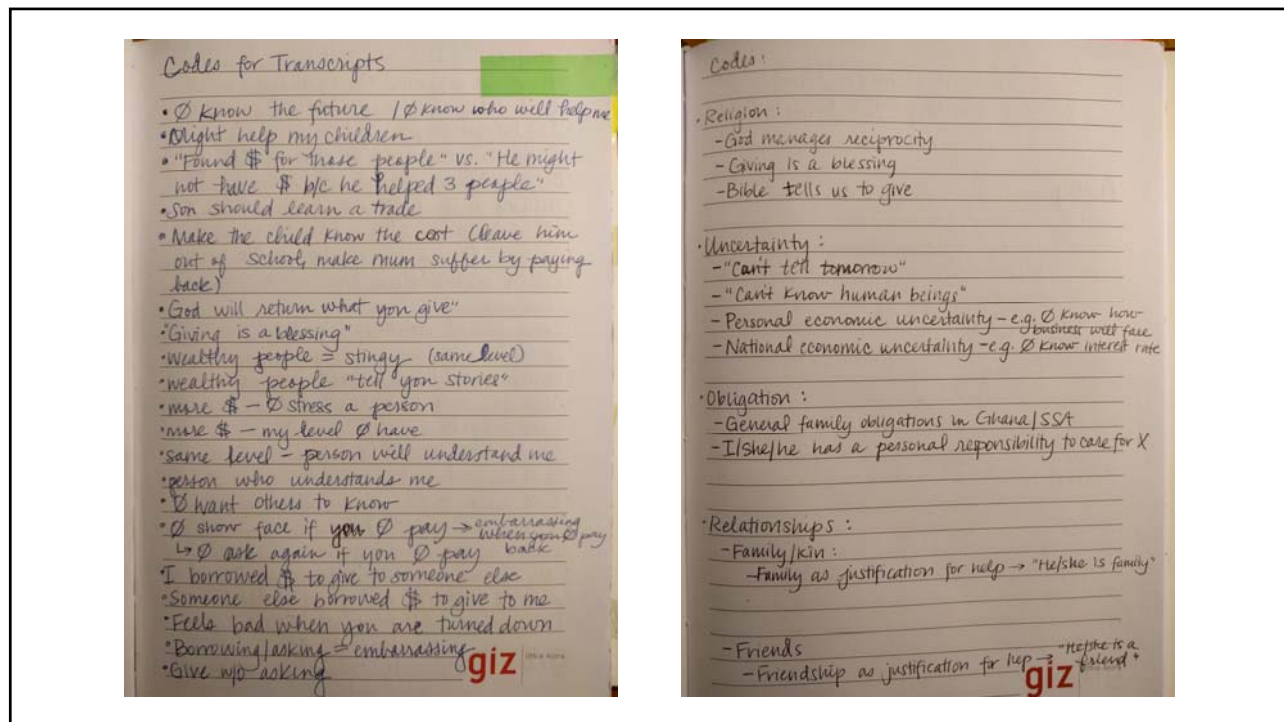
### *Emerge from the coding and analysis:*

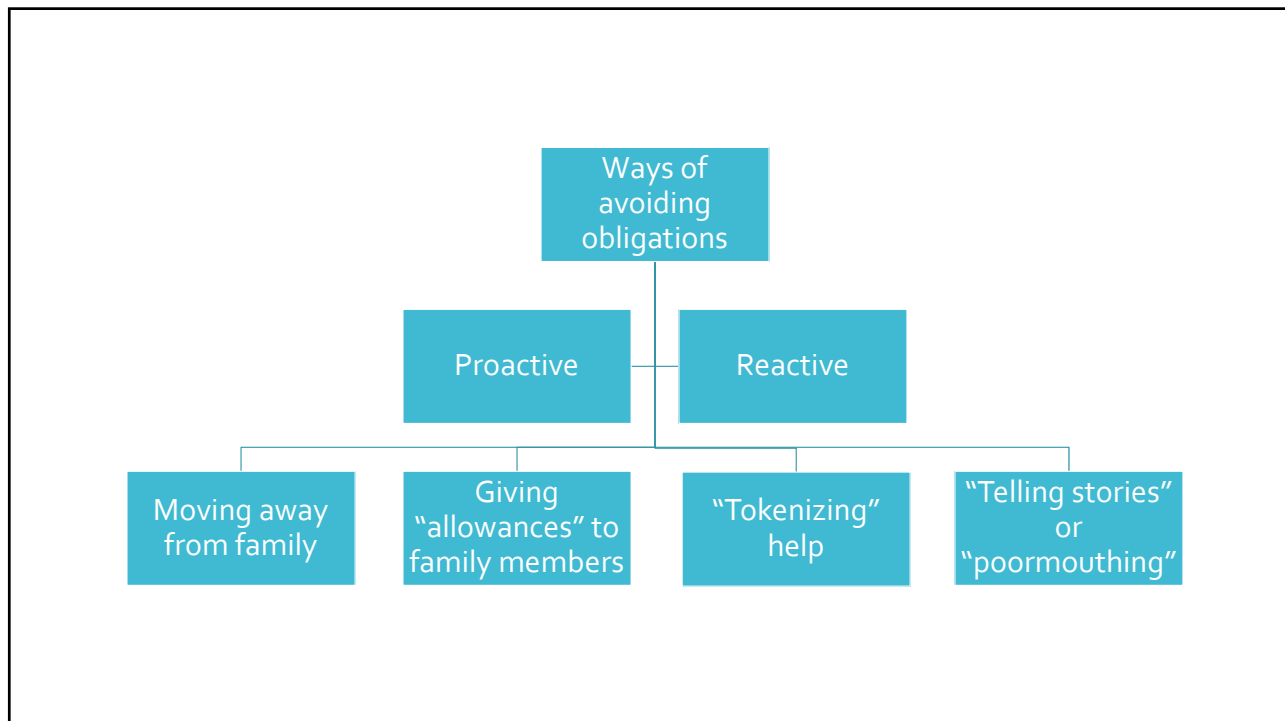
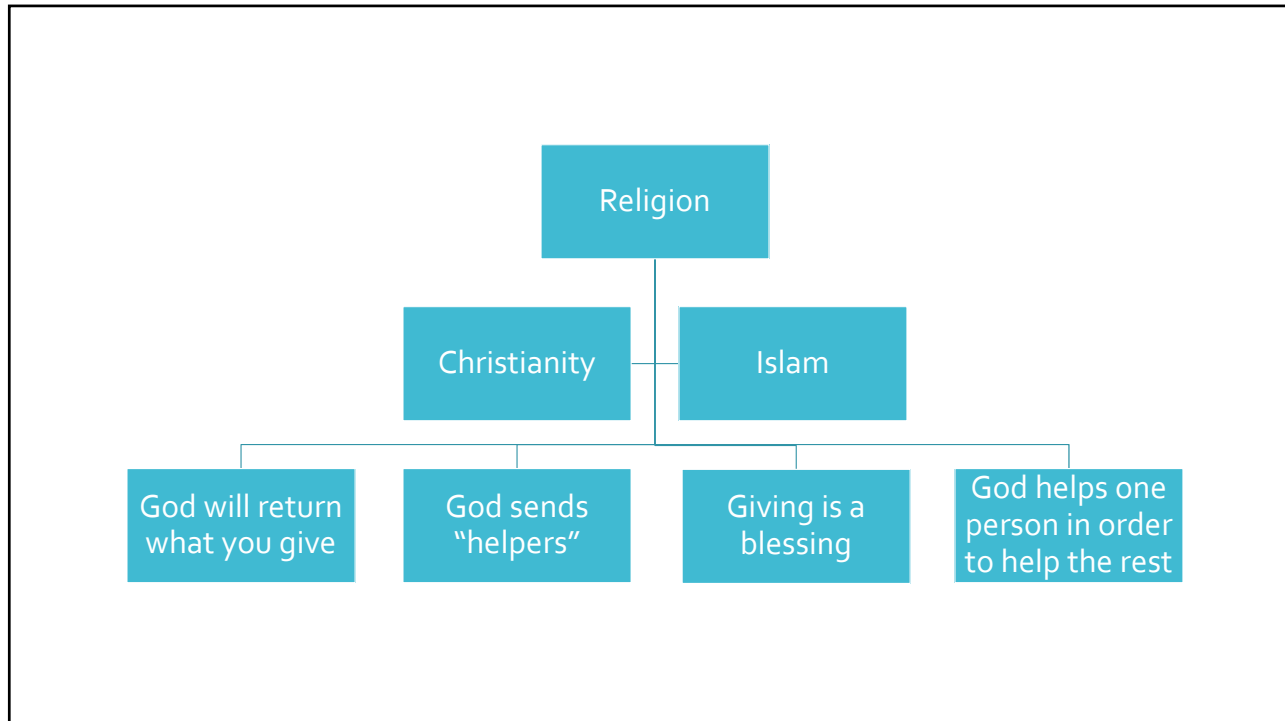
- Mobile phones
- Religion
- Beliefs about banks
- Privacy

## Step 3: Code your data

- Coding is an **iterative** process!

- Start with a list of codes and apply them to a portion of your documents
- Refine and add codes if you think you're missing any big themes or ideas
  - Some codes may be separated into two
    - E.g. "Religion" → "Christianity" and "Islam"
  - Some codes can be consolidated
    - E.g. "Asking someone to wait" and "avoiding phone calls" → "Avoidance Strategies"
- Keep track of your codes!







The screenshot displays a text analysis application. The main window shows a transcript of a conversation with the following text:

I: Is there anyone who is supporting you regularly?  
 R: I have three people supporting me regularly.  
 I: Please, who are they?  
 R: You want their names?  
 I: No, their relations to you.  
 R: They are God-sent.  
 I: God-sent.  
 R: Yes, they're Jonathans. My Jonathan – you understand Jonathan.  
 I: If you can explain it for the purpose of the ...  
 R: [Laughs]. Jonathan is somebody God has given to you to help you. That's a Jonathan.  
 I: So how did you meet this...  
 R: God. That's why I said, God-sent.  
 I: So are they like friends?  
 R: They are more than. One is like a father to me – two are like fathers. One is like my own brother.  
 I: And they're supporting you regularly.  
 R: Yes.  
 I: But then they're not your relatives. They're just God-sent.  
 R: No, they're not blood. Not blood-related.  
 I: Okay, they're not blood. So how do they support you?  
 R: Money-wise. They give me money.  
 I: And what else?  
 R: Money.  
 I: And by regularly – how regular is it?  
 R: It depends. One, semesterly. One, as and when; and another one, monthly. The third one, monthly. And this is like I said, they're God-sent. They are my Jonathans. I prayed to God to give me Jonathan, and he has given me three Jonathans.  
 I: So why do they support you?  
 R: Why? No, let your question be clear, because I said, I asked God to give me a Jonathan; and he gave me three Jonathans. So if you ask me why – I've explained what Jonathan means. Jonathan is somebody sent by God to help you. Do you understand?  
 I: Okay

At the bottom left, it says "Selection: (1642-1642)".

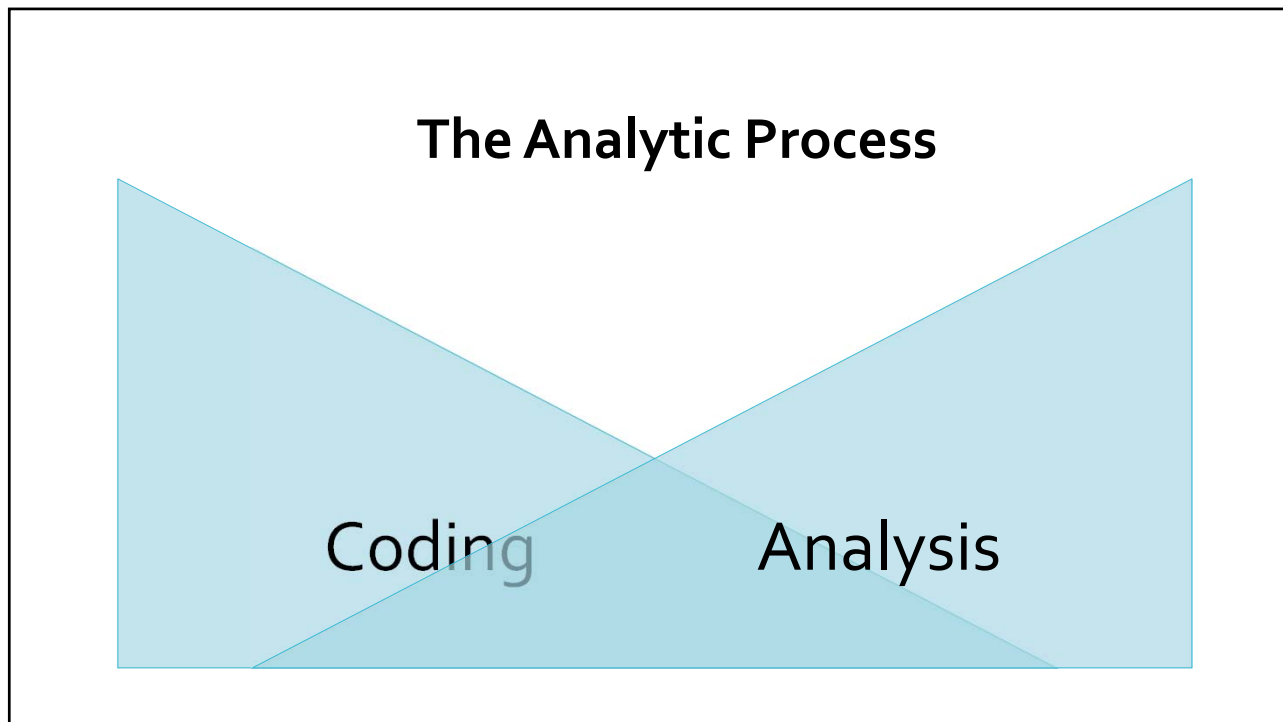
On the right side, there are two panels:

- Selection Info:** Shows a selection of text: "God sends helpers" with a range of (1471-1839).
- Codes:** A list of codes under the category "Religion":
  - Giving brings blessings
  - God sends helpers

## Step 4: Analyze your data

### What is "analysis"?

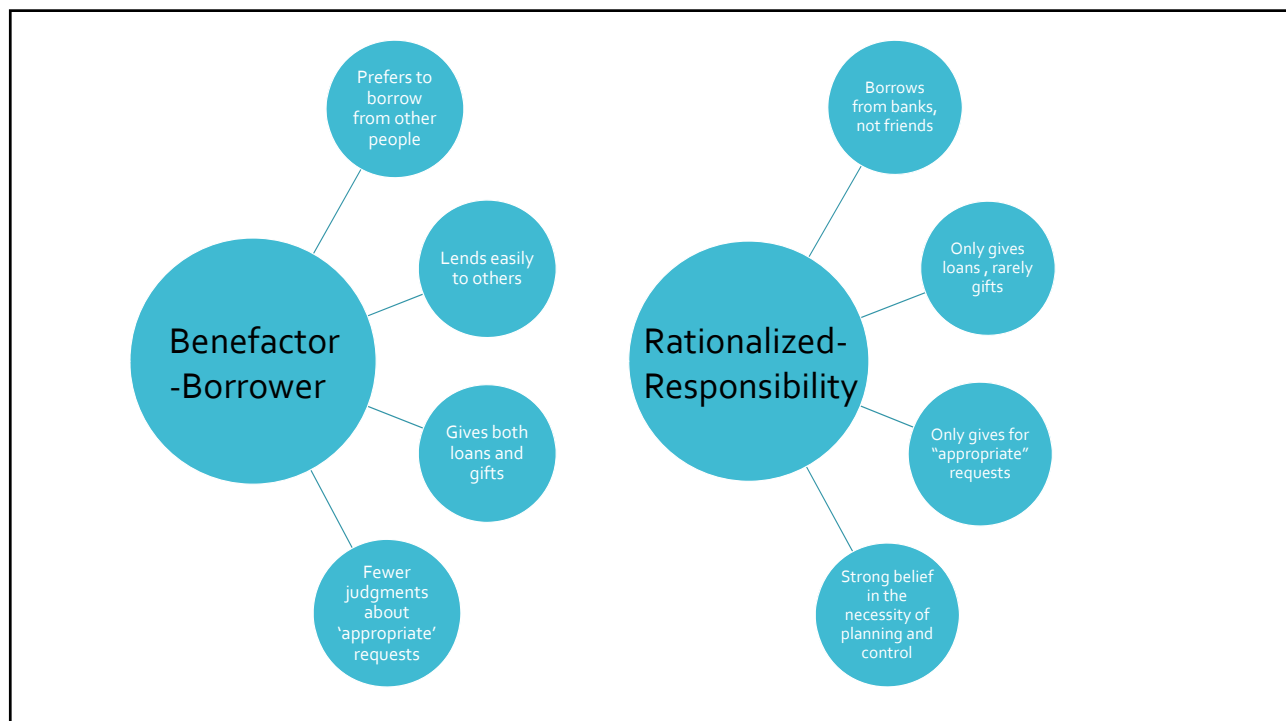
- Analyzing means interpreting, synthesizing, and looking for patterns in data in order to draw a conclusion
- Which aspects of your data will best answer your research question?
  - You will never use all of your data!
  - Identify which units of analysis, codes, and comparisons or relationships are most important



### Step 4: Analyze your data

- What is your **unit of analysis**?
  - Documents
  - Individuals
    - Includes attributes like age, race, gender, job, attitudes and beliefs
  - Organizations
  - Locations
  - Time periods
- E.g. individual attitudes and behaviors are the unit of analysis in my research

- You may have “sub-units”: relevant groupings of data that facilitate comparison and analysis
  - Can be both deductive and inductive
  - “Sub-groups” are groupings that emerge from prior research
    - E.g. “gender” or “socio-economic status” applies to different individuals
  - “Typologies” are theoretical groupings that emerge from data itself, and may cut across sub-groups
    - E.g. “givers” vs. “non-givers” may not be pre-determined, and could include people from all different socio-economic groups



## Step 4: Analyze your data

- Sub-groups facilitate **comparisons**
  - Help you see forces at work in your data
  - Look for similarities, and differences, and connections between categories
  - Which codes and categories frequently co-occur? Which codes and categories *never* co-occur?
- You may look for particular relationships between codes and categories
  - Relationships of time (B precedes B)
  - Relationships of similarity (A and B both say X)
  - Relationships of difference (A says X but B says Y)

Chart Selector

- Media Charts
- Excerpt Charts
- Descriptor Charts
- Code Charts
- User Charts
- Quantitative Charts
- Qualitative Charts
- Packed Code Cloud
- 3D Code Cloud
- Code Co-Occurrence
- Code Application
- Code Weight Statistics
- Code Present / Absent
- Mixed Method Charts
- Codes x Descriptor
- Descriptor x Code
- Descriptor x Descriptor x Code
- Code Weight Frequency x Field
- Code Weight Descriptor Bubble Plot
- Descriptor x Code Count Table

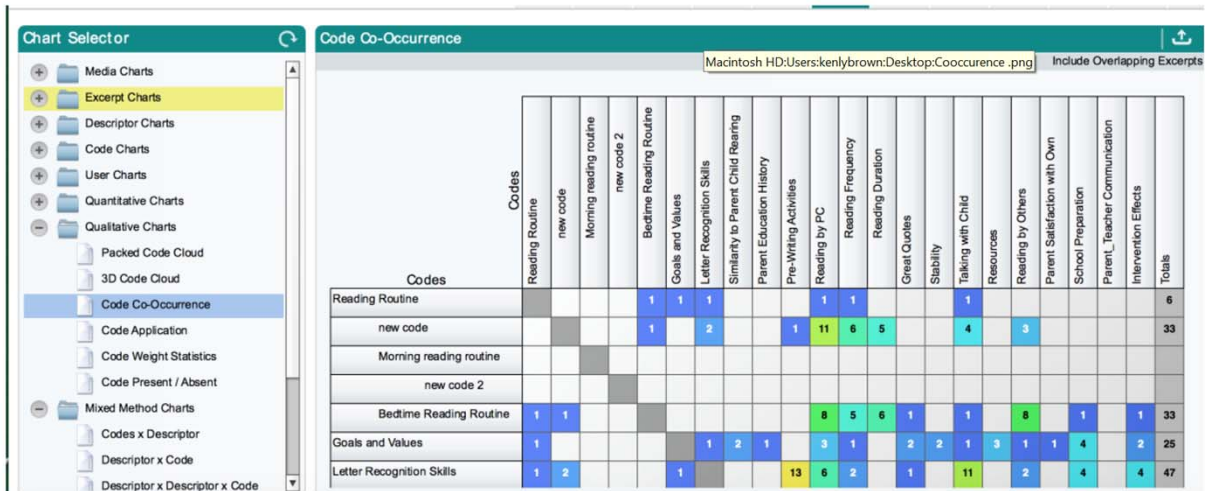
Code Applications

Sort Field Title (Down)

Macintosh HD:Users:kenlybrown:Desktop:Analysis\_Code Application .png

Media	Reading Routine	new code	Morning reading routine	new code 2	Bedtime Reading Routine	Goals and Values	Letter Recognition Skills	Similarity to Parent Child Reading	Parent Education History	Pre-Writing Activities	Reading by FC	Reading Frequency	Reading Duration	Great Quotes	Stability	Talking with Child	Resources	Reading by Others	Parent Satisfaction with Own School Preparation	Parent Teacher Communication	Intervention Effects	Totals
SampleDedoose_How to Read Out	1					1																2
4.22_pre		1				1	1	1		2		1	1	1	2	1	1	2	1	1	1	17
4.22_post										1								1				2
4.22_post					1		2			2	2	1	1			2		1		1	2	15
4.21_pre							1	1	1						1	1	1		1	1		8
4.21_post							2			2	1	1			1	3	1	1		2		16
4.20_pre		1					2	1	1	1	1	1	1	1	1	1	1	2	1			14
4.20_post		1					1			1	2		1		1	2	1	1		3	1	17
3.27_pre		1				1	1	1	1	1	1			1	1	1	2		1	1		14
3.27_post					1	2	1			2	3	1	1	1	2	2	2	3		2		25
3.23_pre		1					2		1	1	1	1	1		1	1	1	2	1			14

## Visualizations



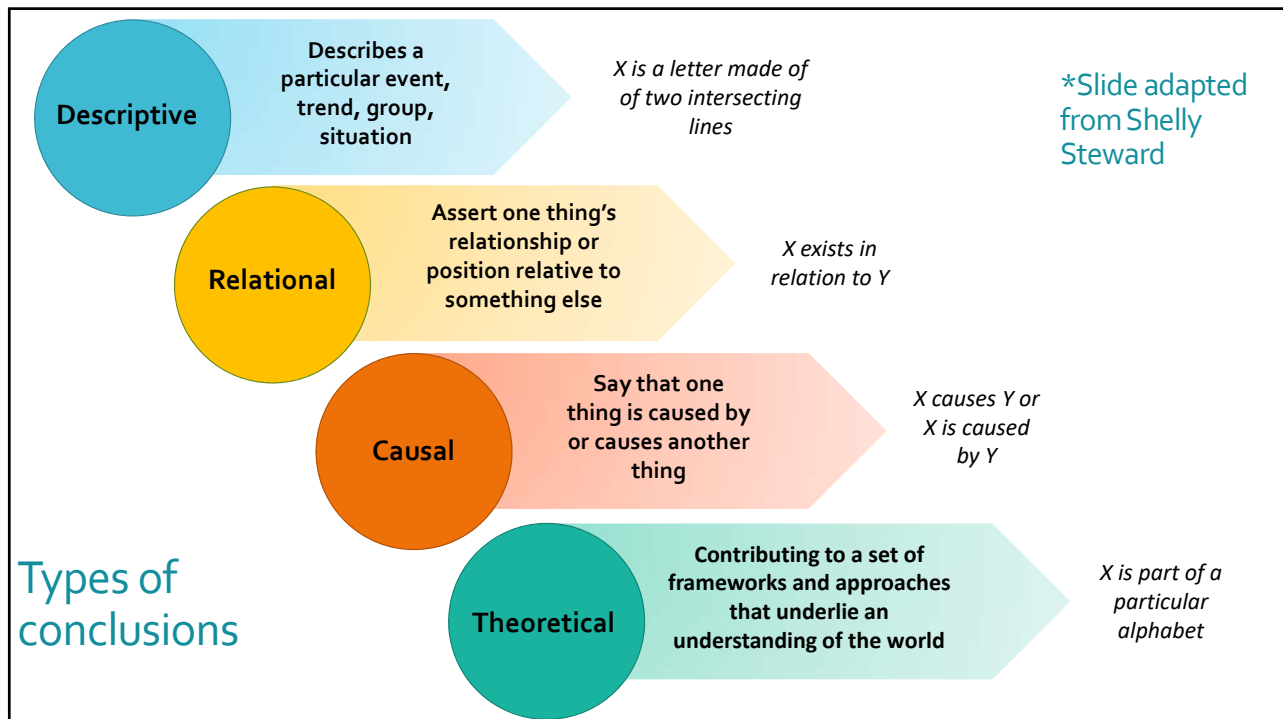
## Memos

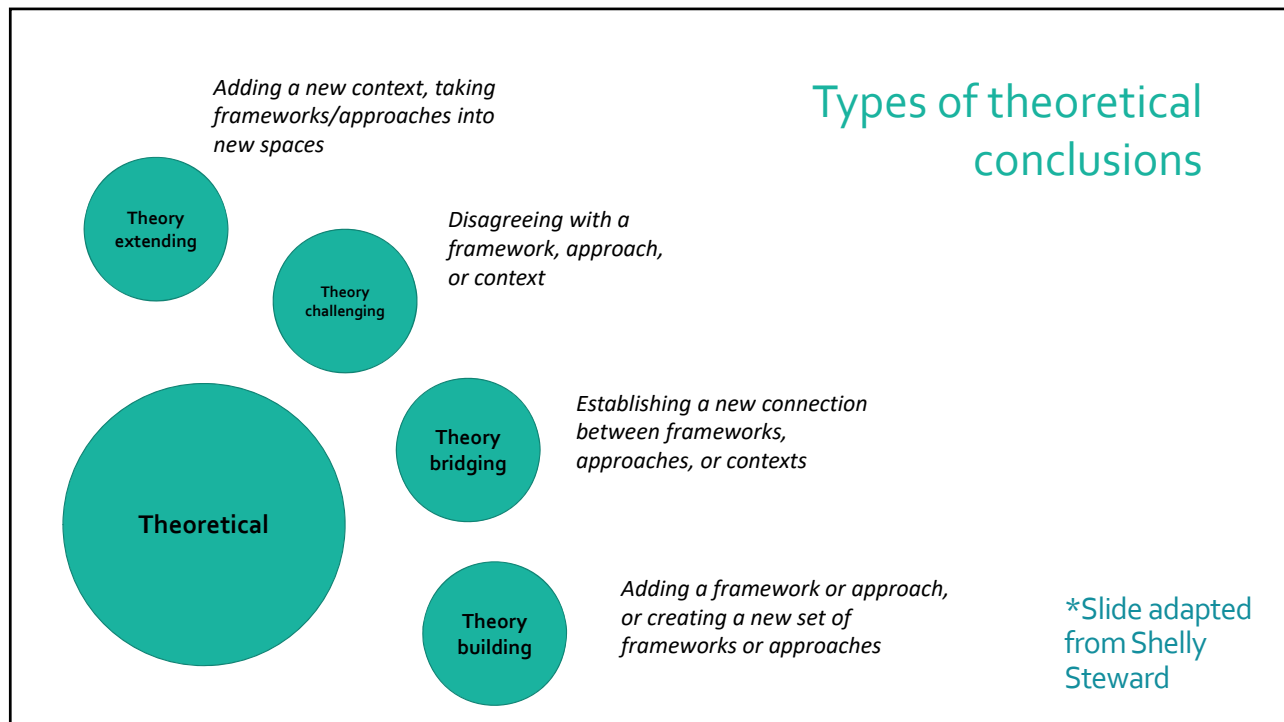
### • Importance of reciprocity

- o Nearly everyone verbalized the importance of reciprocity, but some also noted that their friends and family people didn't necessarily follow this rule
  - About 1/3 of respondents said that they would have difficulty finding someone to ask for \$, even if the respondent have given money to others
- o Reciprocity is not necessarily tit-for-tat: about 1/2 of respondents saw themselves as part of a generalized exchange system where reciprocity is managed by God (i.e. "God will reward you" if humans don't)
  - Oscar: "I'm only doing my duty for blessing, not for anything. Only for God." And "God will reward you. Once you are a Christian, you cannot turn your back [on others' suffering]."
  - (Note: Oscar also said that his younger brother got \$ and didn't share it with Oscar, but now that his brother's money is gone and he needs help himself, Oscar helps him even though he wasn't helped himself.)
  - Rashida: "Sometimes it's getting tiring when you give \$ with no reward, but God is the only reward, so he [Kwabena] should still give [Akos] the \$."
  - David: He gives out whatever he has, and has faith that it will come back to him somehow
  - Faith in a system of generalized exchange doesn't necessarily track onto income or class status (e.g. David and Oscar are both entrepreneurs, but one is much wealthier than the other)
- o Those who don't give out much \$ to others note that they would have a hard time asking people for help as well.
  - George: Would be difficult to find someone to help him b/c "he doesn't depend on people"
  - Oscar: If he needs help, he'll go to someone who would come to him.
  - Theresa: "If you always ask people for money, then they will also ask you. I don't want to get involved in those money relationships."

## Step 5: Draw conclusions

- What is the “big picture” of your research question, data, and findings?
- What kind of story are you trying to tell?





**Financial Inclusion as Network Exclusion: Social Credibility and the Interpersonal Politics of Credit in Urban Ghana**

Lindsay Bayham  
University of California, Berkeley

October 2017

Keywords: credit, social support, social networks, micro-interactions, development, culture, Africa

DRAFT – PLEASE DO NOT CIRCULATE. Intended for submission to *American Sociological Review*

\* Please direct all correspondence to Lindsay Bayham (lindsay.bayham@berkeley.edu; 410 Barrows Hall, Berkeley, CA, 94720). I am sincerely grateful to Ann Swidler, Sandra Smith, Neil Elgert, Katherine Hood, and the Berkeley Center for Culture, Organizations, and Politics for valuable comments on prior drafts.

**Obligation Management, Structure and Agency**

How do people manage all of the obligations that they face?

In this paper, I demonstrate two things: first, there is substantial variation in respondents' feelings about their obligations to financially support friends and family members. Second, this variation creates the opportunity for respondents to practice "obligation management strategies" to balance requests from others with their own socio-economic interests. I typologize these strategies, showing how they work at three different levels: interactional, situational, and at a distance. I also indicate who follows which codes. Finally, I use this data to advance a theory of obligation management as a process of *layering semiotic codes*. I end by discussing other contexts in which these obligation management strategies could apply outside of asking respondents for money.

One final caveat: the discussion below could be taken to imply that respondents universally felt negatively about their social responsibilities, perceiving them "Obligation" is not necessarily *only* pejorative, however: as some psychologists have suggested, obligations may provide individuals with responsibilities that affirm their role and social position, giving meaning to their life (). Indeed, many of my respondents reported feeling good about assisting their relations, and would have liked to support more, but felt that they could not on a limited budget. Respondents' intentions, in other words, were not usually \_\_\_\_\_. As I show below, however, the mismatch between intentions and perceptions of others was precisely what respondents worried about in managing requests. <Nor are all obligations perceived as negative, as suggested by the negative ties literature and the recent Small paper. Sometimes obligations are constitutive and identity-confirming (psych paper)>

**Lit review: Obligations and Financial Outcomes in Developing Countries**

Although generosity is often seen as an unqualified good, a perceived *obligation* to give may have contradictory effects on individuals' emotional and financial well-being. On the one hand, research in both American and African contexts suggests that a sense of obligation to others can boost feelings of belonging and personal meaning (Greenfield 2009, Post 2005, Schurz 2014). Supporting others may create a cycle of generalized reciprocity that underpins community cohesion and resource-sharing (Stack 1997, Uehara 1990, 1995).

On the other hand, requests for support may become overwhelming if they are too frequent. Strong *solidaristic* ties may lead people to sacrifice their scarce resources for others, strengthening social cohesion at the expense of personal savings (Portes and Landolt 1996).

## One final note on “objectivity”

- Don't think of making your data analysis “objective,” but rather *transparent*: allow other researchers to see how you reached your conclusions
- Some journals now request or require that researchers submit examples of coded documents to indicate how they interpreted their data

## Additional resources

- Analyzing Social Settings, by John Lofland and David Snow
- Qualitative Data Analysis: An Introduction, by Carol Grbich
- Qualitative Data Analysis: A Methods Sourcebook, by Matthew Miles and Michael Huberman
- The Coding Manual for Qualitative Researchers, by Johnny Saldana





Thank you!

Lindsay Bayham  
lindsay.bayham@berkeley.edu

## Review

- Make an **analysis plan**: what relationships, comparisons, categories and codes will best help you answer your research question?
- Return to the categories that are important for your research question
  - What units of analysis are you looking at? Are there important sub-categories or comparisons that you are making?
  - What codes / concepts / tags / themes help you make conclusions about these categories?
- What kind of relationships are you looking for between codes and categories?
  - Relationships of time (B precedes A)
  - Relationships of similarity (A and B both say X)
  - Relationships of difference (A says X but B says Y)