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Reflecting on the Future of QDA Software: Special Issue of The Qualitative Report

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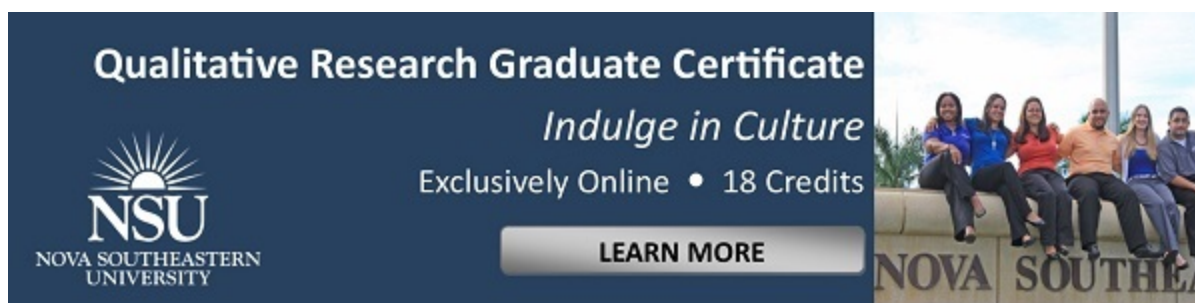
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Reflecting on the Future of QDA Software: Special Issue of The Qualitative Report

Abstract

This article introduces the special issue of *The Qualitative Report*, which brings together five papers exploring the scope, depth, history and future of Qualitative Data Analysis software (QDAS), originally presented at a conference in Rotterdam in 2016. The selected papers provide insights into the history of the QDAS community and future developments of the software packages, uses of QDAS for tasks beyond text analysis, the promise of a common exchange format for researchers using different packages, and strategies for putting to rest, once and for all, persistent misconceptions about QDAS that continue to circulate in the literature and during education and training events. We also suggest a “wish list” for future QDAS developments, including the ability to import e-books, full integration with data mining approaches, and engagement in the Open Science movement.

Keywords

Qualitative Data Analysis Software, CAQDAS, KWALON

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Reflecting on the Future of QDA Software: Special Issue of *The Qualitative Report*

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This article introduces the special issue of The Qualitative Report, which brings together five papers exploring the scope, depth, history and future of Qualitative Data Analysis software (QDAS), originally presented at a conference in Rotterdam in 2016. The selected papers provide insights into the history of the QDAS community and future developments of the software packages, uses of QDAS for tasks beyond text analysis, the promise of a common exchange format for researchers using different packages, and strategies for putting to rest, once and for all, persistent misconceptions about QDAS that continue to circulate in the literature and during education and training events. We also suggest a “wish list” for future QDAS developments, including the ability to import e-books, full integration with data mining approaches, and engagement in the Open Science movement. Keywords: Qualitative Data Analysis Software, QDAS, Qualitative Data Analysis, Digital Tools for Qualitative Research

Introduction

This special issue brings together five papers exploring the scope, depth, history and future of Qualitative Data Analysis software (QDAS)¹. In August 2016, developers, trainers, and users of these packages gathered in The Netherlands at Erasmus University for a KWALON conference that served as a context for reflection and debate on current challenges and future directions. The papers in this issue were initially presented in Rotterdam and have been further developed for publication with the assistance of our peer reviewers and the editorial team. We hope that this collection provides insights into the history of the QDAS community and future developments of the software packages, uses of QDAS for tasks beyond text analysis, the promise of a common exchange format for researchers using different packages, and strategies for putting to rest, once and for all, persistent misconceptions about QDAS that continue to circulate in the literature and during education and training events.

QDAS packages have been around since at least the 1980s, and a substantive body of literature has been published about their use (see for example, Davidson & diGregorio, 2011; Davidson, Paulus, & Jackson, 2016; Evers, 2011; Evers, Silver, Mruck & Peeters, 2011; Paulus, Davidson & Jackson, 2017). Urszula Wolski from the University of Northampton (Wolski, 2018, this issue) reports findings from her interviews with software developers, early adopters and trainers who were integral to the creation of a QDAS network. Her paper serves as a valuable historical record of how this particular innovation resulted in a tight-knit

¹ Otherwise known as Computer-Assisted Qualitative Data Analysis (CAQDAS).

community of practice, and how commercialization and internet technologies impacted the diffusion of QDAS as an innovation.

Over the past 30 years, the software packages have evolved a great deal and are being used in innovative ways by researchers. Two papers in this issue illustrate how QDAS can be used for research activities beyond text analysis. Maureen O'Neill of the University of the Sunshine Coast, Sarah Booth of Edith Cowen University and Janeen Lamb of Australian Catholic University (O'Neill, Booth, & Lamb, 2018, this issue) describe how to use NVivo for literature reviews via their Eight Step Pedagogy (N7+1). As literature reviews in many ways resemble analysis of qualitative data, teaching novice researchers to use QDAS for this part of the research process may make them more confident when using it with their data later on. The authors describe how the search, classification, coding, and visualization tools that NVivo offers, as well as integration with reference management systems, can be used to create a systematic (and paperless) literature review process.

Indeed, QDAS packages have an important role to play *across* the research process (Paulus, Lester & Dempster, 2014), and leveraging QDAS for literature reviews is one such role (Lubke, Britt, Paulus & Atkins, 2017). At the same time, no technology is neutral, and so careful attention must be paid to how QDAS, and other digital tools, are changing our research practices, for better and for worse. Using QDAS for literature reviews changes the very nature of that kind of work and requires a significant change in how we handle texts.

Another role is to facilitate the handling of audio-visual data sources. Liliana Melgar-Estrada from the University of Amsterdam and Marijn Koolen of the Royal Netherlands Academy of Arts and Sciences (Melgar-Estrada & Koolen, 2018, this issue) report on a comparative analysis conducted in the context of the Dutch Digital Humanities infrastructure project CLARIAH. Through a careful analysis of the affordances of Transana, NVivo for Mac and ELAN for Mac, they propose a baseline for questions researchers should ask when selecting software for working with audio-visual materials. In this age of smart phones, YouTube, and social media, the identification of core research tasks and how software can best support their implementation will be invaluable. As the new generation of scholars come of age, they are already comfortable with reading, writing, and doing all kinds of creative work in front of a screen. For them, using computers for research (and everything else) is a given, not a topic for debate, and they are often eager to join this community of practice that has been evolving since the 1980s. For those sometimes referred to as "the YouTube generation", video, images, and social media are the very fabric of their daily lives; it is no surprise that QDAS is evolving to better handle these audio-visual "big data" sources as we seek to interpret today's world.

The paper contributed by Jeanine Evers of Evers Research & Training, and organizer of the KWALON 2016 conference (Evers, 2018, this issue), is based on her opening plenary remarks about the future of QDAS and what she subsequently learned through ongoing conversations with the developers. She explores seven issues, including the proliferation of new features vs. offering a "light" version, the role of methodological expertise in effective software adoption, the impact of big data and machine learning on qualitative analysis, security in the age of "the cloud", and data archiving. Evers achieved her goal for organizing the KWALON conference, which was to establish the Rotterdam Exchange Format Initiative (REFI). Developers are currently working to create a common exchange format so that projects might be shared between software packages, and Evers' paper reports on the progress of this initiative.

Even though QDAS packages have been eagerly embraced by many researchers, some remain skeptical if not downright suspicious of their role in qualitative research. To address this fact, Kristi Jackson of QUERI, Inc., Trena Paulus of the University of Georgia and Nicholas Woolf of Woolf Consulting (Jackson, Paulus, & Woolf, 2018, this issue) conducted

a literature genealogy to explore the role of citation errors in keeping unsubstantiated criticisms of software use alive. Specifically, they show how the frequently raised criticism, “Software distances the researcher from her data,” arose from the literature. Jackson et al. use a zombie metaphor to describe the persistence of such criticisms and offer specific recommendations for how the QDAS community might work together to find a cure. While some critiques of QDAS are indeed misconceptions that refuse to die, others are warranted and should be taken seriously as an opportunity for developers, users and trainers to work together to continuously improve the tools.

A wish list for future QDAS development may include the following. Undoubtedly, the inability for a researcher using ATLAS.ti to collaborate with a researcher using any other software package (e.g., Dedoose, f4analyse, MAXQDA, NVivo, QDA Miner, Quirkos or Transana, to name a few) adversely affects the research process. Thus, the work being done by the Rotterdam Exchange Format Initiative is an important step that is currently underway, and we encourage this initiative to result in the ability to create a project file that can be placed into digital archives such as the Qualitative Data Repository at Syracuse University or the DANS Archive in The Netherlands.

The ability to import e-books, similar to PDF copies of journal articles, into QDAS would also help improve the scholarly workflow. This would undoubtedly require coordinating permissions between e-book and QDAS companies, but it would enable researchers to import *all* their literature sources in one project file.

Initiating a more principled investigation into the methodological gaps and obstacles for the integration of data-driven paradigms into the practice of qualitative text analysis is also on our wish list. To borrow the terminology of the digital humanities: workflows based on “close reading” can be enhanced with methods that are suited for the exploration of large volumes of content through “distant reading” (Moretti, 2013). While they will not be able to replace human interpretation, such tools would help scholars more efficiently navigate the larger volumes of text that are now available. Methods of text mining can help point to “hotspots” in the data as defined by the research question. The integration of these two types of “reading” again is one that will require collaboration between scholars, experts in text analytics for big data and QDA developers.

Finally, we highlight the move towards responsible data science that is part of the [Open Science movement](#) and the subsequent need for transparency in analytic practices. This not only includes expectations regarding the reuse of research data (and the need to be able to exchange annotated data across QDAS platforms), but also the growing demand for text analytics to deliver results that can help citizens, policy makers and other professionals take the step from (big) data to (big) decisions in a responsible manner. For this to happen, both the process and outcomes of analysis need to be transparent to the consumers of research.

Together, we hope these papers provide insights to both experienced and prospective QDAS users about how these tools can support research work. In closing, we would like to thank Ron Chenail for the chance to share this special issue with the TQR and larger qualitative research community. We would like to take this opportunity to thank those who served as peer reviewers for these papers: William Allen, Kelley Burton, Judy Davidson, Rachael Gabriel, Cliff Haynes, Cynthia Jacobs, Jessica Lester, Élias Rizkallah, Johnny Saldaña, and Daniel Turner.

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Trena M. Paulus is professor of Qualitative Research Methods at the University of Georgia. She holds degrees in applied linguistics and instructional systems technology and is the author of *Digital Tools for Qualitative Research* (Sage, 2014). She studies the impact of new technologies on qualitative research methods, specializing in the adaptation of language-based research methodologies such as conversation and discourse analysis to understand online talk and text. She is a founding member of the International Congress of Qualitative Inquiry's special interest group on Digital Tools for Qualitative Research. Her methodological text, *Researching Online Talk: Looking for Insights, Transformation and Learning*, will appear in 2018 (Routledge). Correspondence regarding this article can be addressed directly to: tpaulus@uga.edu.

Jeanine C. Evers has a background in cultural anthropology and public administration. She has extensive experience conducting qualitative research in both The Netherlands and the

Dutch Antilles. She has held several university positions at Dutch universities since 2001, most recently in the criminology department of Erasmus University Rotterdam. She has published several books on qualitative interviewing and qualitative analysis in Dutch (2007-2015). In 2004, she started the KWALON course department for short courses in qualitative methods and data analysis software, which has functioned as Evers Research & Training since 2011. She serves on the board of KWALON, the Dutch Network of Qualitative Research, is a member of the Scientific Committee of the European Congress of Qualitative Inquiry and chairs the Rotterdam Exchange Format Initiative (REFI). Correspondence regarding this article can also be addressed directly to: jcevers@eversresearch.nl.

Franciska de Jong has a background in theoretical linguistics. She moved into the area of computational linguistics and human language technology in 1985 when she joined Philips Research to work on machine translation. At Erasmus University Rotterdam she combines her work as chair of e-Research for the Social Sciences and the Humanities at ESHCC with her role as director of the Erasmus Studio. She is also a professor of e-Research for the Humanities at the University of Utrecht and is the Executive Director of CLARIN ERIC, the European infrastructure for language resources. She has served on the board of the Dutch Research Council (NWO), the Dutch National Library (KB), and the Netherlands e-Science Center.

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