

On the Timelessness and Timeliness of Categorical Analysis: the past, present, and yet to come of searching for latent meanings

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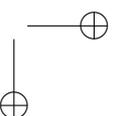
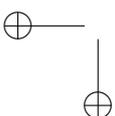
Abstract

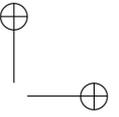
From the past to the present, and from the present into the future, this paper (re)discovers categorical analysis as a cross qualitative technique, adapted to old and new communication objects. Categorical analysis has been performed on a wide variety of written, audio and visual documents, and undertaken by researchers in many different disciplines, including sociology, psychology, anthropology and political science, but also communication, management, marketing, sports, tourism, art or literature studies. Over the years and transversely, researchers using categorical analysis engage on a systematic and in-depth analysis of material looking for the la-

tent meanings allowing to understand social reality. In this text, empirical illustration of such an endeavour is taken from the author's own work operating QSR's ©NVivo qualitative software. The detailed presentation and reflection upon a case study aims at leaving in the possible reader an impressionist trait on the long yet challenging path from data collection to the scientific writing. Ultimately, this text intends to be a creative venue, leading the very beginner student, the most fledgling or established researcher, employing either the pencil or laptop, free to imagine, design and explore innovative research objects of analysis through categorical analysis.

Keywords: Categorical analysis, content analysis, qualitative analysis, methodology, CAQDAS, QDA software.

At last, however, he began to think – as you or I would have thought at first; for it is always the person not in the predicament who knows what ought to have been done in it, and would unquestionably have done it too – at last, I say, he began to think that the source and secret of this ghostly light might be in the





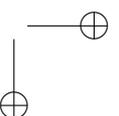
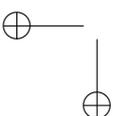
adjoining room, from whence, on further tracing it, it seemed to shine. This idea taking full possession of his mind, he got up softly and shuffled in his slippers to the door. – Charles Dickens, A Christmas Carol (1843)

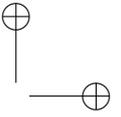
Introduction

WHAT does Dickens classic tale of a cold, bitter and miserly nineteenth century man of business established in London and who does not like Christmas, may have to do with advanced methodologies for communication studies, and particularly categorical data analysis? Binding with the example that will be brought in later as an empirical illustration, this story, written more than one hundred and seventy years ago, adapted multiple and over time to film, stage, opera, ballet, musical and even animation movies, perfectly fits the motto of this paper and its underlying argument: categorical analysis is a leading and enduring tool to explore old and new communication objects.

Categorical analysis can be defined as a careful, systematic, in-depth examination and interpretation of a selected body of material with the purpose of identifying patterns, themes and hidden meanings (Bryman & Burgess, 1994). Typically, it is undertaken over a wide range of written documents, photographs, motion pictures, videotape or audiotape records, and it has been used by a broad variety of disciplines, including sociology, psychology, anthropology and political science, but also in business, marketing, sports, tourism, media, art or literature studies. It is true that categorical analysis is as old as many of those disciplines. However, it is also true that artefacts of human communication go along with societal changes in a never-ending interplay. This text presents the categorical analysis as a powerful tool to analyse old and new objects while rediscovering its potentials to help overcoming some of the challenges faced by the researchers in the new millennium (e.g., data dissemination via ICTs, internet-based research, and software development).

This paper does not intend to be an exhaustive explanation of what is categorical analysis, its history, intellectual roots and developments, not even to be a detailed guide on how to carry it out. There are several good handbooks, which can serve that purpose and help both the very beginner student and the more established researchers. Some of those guides even won the respectfully





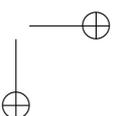
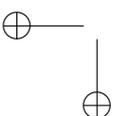
admiration of scholars either in the Anglophone academic community (Krippendorff, 1980, 2004; Miles & Huberman, 1994) or the Francophone (Bardin, 1977). Although the categorical analysis may be used with a variety of objects of analysis, this paper deals with a particular source of data coming from oral interviews carried out in the framework of scientific research.

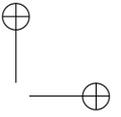
Harkening the voices from the field on Christmas as plural lived family practices, the sequential pace of the novella *Christmas Carol*, namely, the supernatural visits from the Ghosts of “Christmas Past,” “Present,” and “Yet to Come” to Ebenezer Scrooge, unhesitatingly inspired the threefold structure which this paper is based upon. After the presentation of categorical analysis as a pervasive qualitative technique, its background, languages and pathways, the text then moves on discussing some of the challenges arising when shifting from the human-based to computer-based content analysis. An empirical illustration from the author’s own work on categorical analysis using QSR’s ©NVivo qualitative software is later brought into the text. The detailed presentation and reflection upon a case study aims at leaving in the possible reader an impressionist trait on the long yet challenging path from data collection to the scientific writing. Lastly, the concluding section revisits some of these challenges and incorporates them in the categorical analysis’ crosscutting roads into the future.

Rather than a recipes book on “how to do”, this text ultimately intends to be a creative venue, leading the very beginner student, the most fledgling or established researchers, employing either the pencil or laptop, free to imagine, design and explore innovative research objects of analysis through categorical analysis.

The Past: background, languages, and pathways of the content and categorical analysis

Seduced by the multilayered meanings of the world around, social researchers for long have discovered content analysis as a powerful tool of analysis. Yet the interpretative attitude to analyse texts has existed forever, content analysis history is commonly rooted in the beginning of the 20th century. It was mainly in the USA that this way of analysing texts has been established as a rigorous means to look beyond the more visible or manifest content, in se-

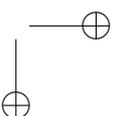
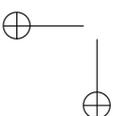


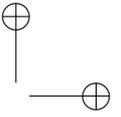


arch for its ultimate and latent meanings. Specifically, content analysis can be defined as “ways of analysing meaningful matter, texts, images, and voices” (Krippendorff, 2004, p. xxii). However, this is not a haphazard, unsystematic or plain task; rather content analysis is a scientific means allowing “a careful, detailed, systematic examination and interpretation of a particular body of material in an effort to identify patterns, themes, biases, and meanings” (Berg, 2009, p. 338).

Krippendorff (2004) argues that major milestones in the history of content analysis include drawing back to the inquisitorial pursuits by the Church in the 17th century. During the 20th century, content analysis moved on beyond its initially journalistic roots into the analysis of the problems during the 1930s and 1940s, namely the economic crisis, radio, TV and political changes, and the propaganda analysis during World War II. We had to wait until the 1950s to find the first world-recognized work of content analysis. After the seminal work of Berelson (1952), regarding communication studies, the use of content analysis expanded to numerous other disciplines (e.g., political studies, psychology, anthropology, ethnography, history, sociology, linguistics and education studies). Despite it had already entered in psychological and social sciences, in the 1980s content analysis was used mainly in journalism and communication research. In recent years, not so established fields also contributed greatly to its development, namely psychotherapy, advertising, politics and the arts (Krippendorff, 2004).

Of all content analysis, categorical is probably the oldest and the most-used variant used by social scientists working in different countries and disciplines (Bardin, 1977). The explanation is quite simple indeed: categories are all around us. Categorical analysis is always at the basis of content analysis because categorical distinctions tend to rely on taxonomies as a way of understanding. Categorical analysis “simply” divides the text in meaningful units allowing the identification of categories to be retrieved later. In this sense, it can be put together with thematic distinctions. In the words of Berg, content analysis is chiefly “a coding operation and data interpreting process” (Berg, 2009, p. 339). Actually, the development of thematic analysis implies coding and classifying data according to a set of themes – decided either before or during the analysis –, and finally interpreting the resulting thematic structures. By the end, thematic analysis seeks for commonalities, relationships

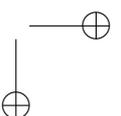
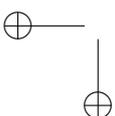


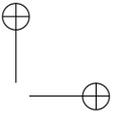
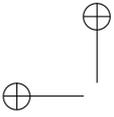


and overarching patterns that can help the researcher in the difficult task of understanding the social reality. The same happens with categorical analysis.

The tenuous distinctions between categorical and thematic analysis put the focus of attention not in the lexicon, rather in its execution. Coding thus becomes the basic and best-known analytic strategy used in a content analysis. By coding, it is meant a systematic process of reading and analysing a text looking for recurrent themes, which can be specific topics or relationships between topics. According to Strauss and Corbin (2008), there are three major stages of coding: open coding, which is a procedure for developing categories of information; axial coding, the procedure for interconnecting the categories; and selective coding, the final procedure for building a story that connects the categories producing a discursive set of theoretical propositions and making the descriptions intelligible to the reader. When using other supports beyond text (e.g., video or audio segments, frames, photo or draw sections, etc.), the procedure is similar: to code is to select meaningful pieces from the raw material under analysis. Following Strauss (1987), to code is to ask the data a specific and consistent set of questions: who?, when?, where?, what?, how?, how much?, why?. The next step is to analyse data minutely. Similar passages are then marked with a code or a label –categorizing –, so that later they can be retrieved according to specific orientations and used in theory building.

Researchers can use a wide variety of paths in categorization. They might use their own and a-priori defined research questions, the interview questions, or even some theory-derived categories or concepts already tested in other studies offering relevant explanations to the research focus. While this approach can facilitate either within or by cross-case comparisons, it is usually contrasted with another one in which the researcher has no start-list of a-priori categories to begin with. In fact, this inductive approach to coding is considered more typical of thematic analysis. In so doing, themes emerge from and are grounded in the data. In qualitative research, procedures of coding inductively are strongly related with the “grounded theory” approach (Glaser & Strauss, 1967; Strauss & Corbin, 2008). While inductive thematic analysis somehow refuses the rigidity and closure of a deductive approach expressed in using a-priori categories, it leaves the researcher freer to dive into the raw data and to engage in a truly in-depth understanding of the hidden dimensions that structure them.

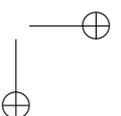
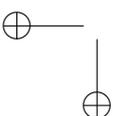


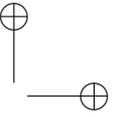


What is meaningful in a text? Meaning is, as Krippendorff states, any “denotations, connotations, insinuations, implications, associations, metaphors, frames, uses, symbolic qualities, and so on” (2004, p. 323). The answer to the question is between the interplay of experience, induction and deduction. Starting with categories (deductively), getting gradually to them (inductively), or applying some kind of combination between both approaches are all legitimate and useful paths. Analysing data minutely, they will unveil hidden relations and latent meanings. Accordingly, the researcher should never assume the analytic relevance of any “traditional” variable (e.g., age, sex, social class, etc.), until the data shows it to be relevant. It was in this context that the words of Strauss became classical: [when analysing data] “believe everything and believe nothing” (Strauss, 1987, p. 28).

After the categorization, it is necessary to find dimensions for categories, in other words, properties, which the number of and the complexity vary depending on the extent of depth of the study. In this regard, the example from Strauss and Corbin (2008) concerning colour also became classical: colour has the properties of tone, shade and intensity. Dark and light constitute shade dimensions. The process of constant comparison is at the centre of content analysis as it leads to saturation. This process, briefly summarized into the task of “coding the same in the same way”, entails a permanently task of coding and listing all possible meanings, then comparing data against codes and categories. The researcher subsequently goes back through documents, and at the same time he/she revises coding, records interpretive insights into research memos, and once again returns to the data to validate the codes. By the end, he/she can choose data displaying in order to reveal overarching patterns that unveil its exploratory, descriptive, or explanatory case analysis.

Though it has not completely abandoned the original quantitative perspective, most-recent content analysis has greatly increased due to an impulse coming from the qualitative approach. Hence, content analysis definitely entered in the interpretative approaches of qualitative procedures in data analysis (Miles & Huberman, 1994). This orientation allows researchers to treat social action and human activity as text, which somehow express different layers of meaning. As Krippendorff puts it, “text is always qualitative to begin with” (Krippendorff, 2004, p. 87). According to this perspective, the raw material is converted into words, usually compiled into extended text coming mainly from observations, taped interviews or written documents.





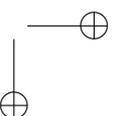
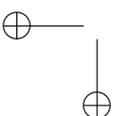
Insofar as typically content analysis was done with various permutations of written documents, such as newspaper articles, historical or site documents, transcripts from interviews, diaries, letters and other personal documents, research memos and field notes, literature pieces or music lyrics; more recently it was used in the analysis of different kinds of visual documents such as photographs, drawings and diverse other images (e.g., advertisements, maps, . . .), and motion pictures. Yet new materials keep feeding both fans and curious about content analysis. Media on-line (e.g., journals, magazines) and everything that goes around it (e.g., comments, hyperlinks, advertisements) are a good example. Moreover, the generalization of the computer and its importance in the daily life of individuals has brought new ways of data gathering, namely through e-mail interviewing, analysis of discussion groups and forums on the web or web surveys, posts in blogs, comments in Facebook, or YouTube, personal or institutional web pages, photos available online in the several platforms' users profiles or kept in the mobile or notebook memory.

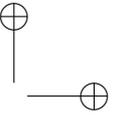
Unmistakably, in recent years the use of computers became gradually visible in the work, education, leisure, and many other countless spheres. The scientific arena, and particularly the qualitative research domain, constitutes no exception. Although thoroughly rooted in the past tradition, computers are deeply and irreversibly changing the way – and the meanings – of content analysis. The next section adds a further thought on this.

The Present: from the human-based to computer-based content analysis – What is going on?

In 1980, Klaus Krippendorff advocated that content analysis was at crossroads between either a more quantitative or qualitative approach. While these crossroads have not been completely dimmed yet, it now intersects with new challenges, unthinkable at that time. Twenty years passed by, the “ongoing information revolution” (Krippendorff, 2004, p. xiii) is at the centre of an intense methodological debate about the role – and power – of computers in data analysis.

According to Krippendorff (2004), two major developments have influenced content analysis as it stands today. The first one is the frequency, and the way one uses word-processing software. In fact, using the computer has

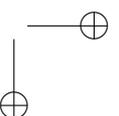
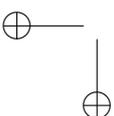


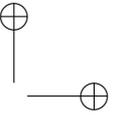
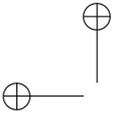


become increasingly common. Moreover, there is an enormous set of advantages coming from the general-purpose software packages, which the majority of individuals nowadays use for work, academic and personal contexts. The familiarity in operating such a software has provided everyone the simple and fast way to use ordinary tools as word or phrase finding, thus allowing to perform in seconds a kind of analysis that previously took long hours to be done (e.g., KWIC – Keyword In Context analysis).

Another important stimulus in the development of computer-aided analysis has to do with the growing availability of text in the digital form. Texts are nowadays “naturally” available for use with and within computers and other electronic-based devices. Either raw or secondary data are constantly being generated or making available in the web, thus calling the attention of social scientists. Books, journals, research reports, even PhD thesis, and many kinds of personal writings and data available from personal web pages, online multiuser discussions (MUDs) and news groups are now ready for use in electronic form, and its number increases each second. Compared with other texts which the treatment is very costly and time-consuming (e.g., audio recordings of interviews, speeches or any other records needing to be textually transcribed), these texts are freely on hand, and almost native in digital support.

Watching closely these developments, the availability of personal computers also for qualitative analysis has become common from the 1960s onwards, yet since the late 1950s that scholars started to develop software to analyse literal data (non-numerical data). The large volumes of written documents to be processed and the repetitiveness of the coding involved in that task, gradually called the attention to the many possibilities of recurring to computer aid. In fact, software can help with accounting of character strings, text searches, computational content analyses, interactive-hermeneutic approaches. These last ones enable the analyst to manage deeply vast text portions with the ultimate purpose to recognize categories in the data while reading the text, to generate ideas about them, and to explore meanings in the data. The first computer-aided content analysis was reported by Sebeok and Zeps (1958), Hays, 1960 and Stone, Dunphy, Smith, and Ogilvie, 1966 (cited in Krippendorff, 2004, p. 13). Specialized packages of software were then introduced from the early 1980s on (Seale, 2008). The best-known tools for





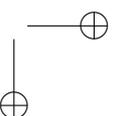
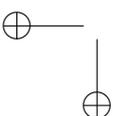
qualitative research include AQUAD¹, Atlas.ti², Etnograph³, QDA Miner⁴, MAXQDA⁵, and NVivo⁶. A Portuguese and recently developed software is webQDA⁷. Definitely, QDA software (Qualitative Data Analysis) or CAQDAS (Acronym for *Computer-Aided Qualitative Data Analysis Software* or *Computer-Assisted Qualitative Data Analysis* (Lewins, 2001, p. 302) has entered once and for all in the thesaurus of social researchers, in line with the demands of the attentive gaze from the scientific community.

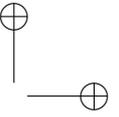
A non-exhaustive list of what computers do in content analysis includes processing large volumes of textual data, speed and storage (Lewins, 2001; Lewins & Silver, 2004; Miles & Weitzman, 1994; Seale, 2008; Weitzman & Miles, 1995; Weitzman, 2000). All authors are unanimous in recognizing that one of the most, if not the most, important reason to use computers in the content analysis is the fact that they allow processing sizeable amounts of data at an astonishing speed. These characteristics are usually opposed to manual data handling with the advantages of being reliable, fast and inexpensive. Another advantage of using software is storage. This is particularly important when dealing with large volumes of data, needing to be properly kept and allowing, at the same time, rapid and effective searches and queries.

Software types vary greatly, including word processors, word retrievers, text base managers, code-and-retrieve programs, theory builders and conceptual network builders (Miles & Weitzman, 1994, pp. 311-312). Each of this particular software deals with specific functions to do qualitative analysis work: coding, memoing/annotation, data linking, search and retrieval, conceptual/theory development, data display, graphics editing. As these functions definitely help to choose one or other software, the way they are cut crossed by flexibility and user friendliness are also key features. Nonetheless, programs are constantly being refined and new ones appear.

Undoubtedly, “qualitative analysis software is a fast-moving field” (Miles & Weitzman, 1994, p. 311). After 20 years, the range of CAQDAS is

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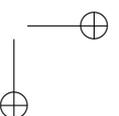
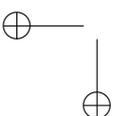


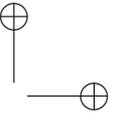
today far wider than the one systematized by these two authors in 1994, in the Appendix to *Qualitative Data Analysis*, titled “Choosing computer programs for qualitative data analysis”. Yet the suggestions therein included do remain as useful as unavoidable when planning serious research. The appendix keeps interest in answering fundamental key issues regarding the use of software, namely: software types and functions, key questions on how to choose software, distinguishing between the various program characteristics and advancing practical information on program developers and distributors.

In its origins, the qualitative software helped mainly in the “housekeeping” (Krippendorff, 2004, p. 341), specifically, doing the hidden yet rigorous chores of content analysis. That included cataloging texts, unitizing the body of the text into more or less independent “pieces” (coding or indexing), then providing a way of collecting identically labelled passages (retrieving). This taken-for-granted method – the code-and-retrieve process – was easily supported by computers and became the basis of the most specialized QDA software. More recently, besides text, software tools also allow to analyse pictures, sound and video files. Software has also improved the data displays capabilities, as the researcher typically needs to see a reduced set of data as a basis for thinking of its meaning, conclusion drawing and verification and/or action taking.

Traditionally, researchers have applied thematic analysis mainly to textual data. Besides any originally written documents, such as biographies, diaries or field notes, they had “transformed” several audio or video records into a written text. Audiotapes or videotapes need to be transcribed, extended, corrected, typed up and edited. Insofar as transcription of data historically became associated with content analysis as an a-prior task for analysing the themes; by now, some computer-assisted qualitative data analysis software already offers the possibility of coding themes directly to digital audio and video files.

Using computers also turns the categorization based upon the informants literal terms – in vivo codes – much easier to track, no matter the approach followed in open coding (e.g., line by line, sentence by sentence, several phrases or sentences, paragraph by paragraph, or the whole document). At the same time, this allows increasing validation through triangulation of data and thick description. This way, empirical validity is recognized by rational arguments that bring hands-on evidence to sustain the research results as well as the entire process of data gathering and analysing (Krippendorff, 2004).

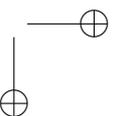
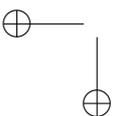


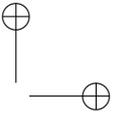


It is true that to code, search and retrieve are basic features of qualitative software. Still, one of the most recognized advantages of using qualitative software is that it brings together data analysis, interpretation and presentation of data, thus allowing a holistic view. As old problems regarding access and accessibility (Flick, 1998, p. 257) become to be more and more outstrip, computers are here to stay. They are revolutionizing the way ones do qualitative data analysis because they “give[s] quick feedback on the results of emerging questions” (Seale, 2008, p. 234). Hence, computer-assisted qualitative data analysis software, which was primarily specifically designed for thematic analysis of qualitative data, nowadays, has stronger and stronger theory-building capabilities.

Just as Laurence Bardin pointed out back in 1977, a computer is not a magician. In the not so far past of the 1980s, tasks behind data collection, transcribing and coding were manual and very time-consuming requiring a huge labour-intensive effort. Compared to that time, now everything seems more computerized, fast and easy. Nonetheless, as I argue later, even though the preliminary tasks required to data analysis can be made faster, searching for latent meanings remains a demanding and time-consuming task as immersing into data require time. Moreover, written words still have no one to “explain” them, which means that the researcher has to keep its curiosity when questioning the data. Shortly, as Miles and Huberman (1994) advocate, analysis has an inflationary character.

Assuredly, one should use computers because they help us with the basic steps of data analysis handling, namely data reduction, data display and conclusion drawing/verification in its different levels of understanding, both descriptive and explanatory (Miles & Huberman, 1994). Accordingly, I could not share more the words of Weitzman when advising that it should be done without “false hopes and fears” (Weitzman, 2000, p. 806); rather “real hopes,” and “real fears”. The illustration that follows is a good example of how far we have more to gain than to lose.





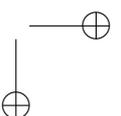
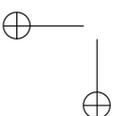
Voices from the field: On Christmas as Plural Lived Family Practices

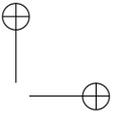
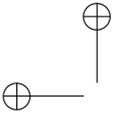
At this point, I turn to an illustration taken from my own previously sociological study on family rituals (Costa, 2011)⁸. Inasmuch a particular kind of family practices (Morgan, 1996; 1999; 2011), family rituals can be defined as any prescribed practice arising from family interaction, targeting a specific purpose and holding a symbolic or special meaning (Bossard & Boll 1950; Wolin & Bennett 1984; Imber-Black & Roberts 1993; Fiese et al. 2002; Fiese 2006). According to Wolin & Bennett (1984), it is possible to distinguish between family celebrations (e.g., rites of passage, annual religious celebrations, secular holiday observances); family traditions (e.g., summer vacations, visits to and from extended family members, birthday and anniversary habits, parties, family reunions); and patterned family interactions (e.g., family meals, bedtime routines for children, and leisure activities on weekends or evenings).

Instead of taking for granted a standardized list of family rituals (Jensen et al., 1983; Fiese & Kline, 1993), in this work the individuals were invited, firstly, to identify the set of events they consider to be “special” in their daily or annual life, as well as during their lives’ course; secondly, to describe those events in such a detail as possible. To collect these data, I used an episodic interview (Flick 1997; 1998). This particular semi-structured interview aims the detailed description of a concrete experience and related meaning through the form of a narrative. One of its key aspects is the interview’s protocol, which combines invitations to provide rich descriptions on concrete events with a detailed set of sub questions aiming to capture in-depth accounts on the relevance of the situation for the interviewee.

For this inquiry, I assumed a “theoretical sampling” (Glaser & Strauss, 1967), more specifically, I followed a process through multiple cases, the “sample by homogenization” (Pires, 1997) and interviewed 30 middle-class individuals, both men and women, living in a medium-sized city in the south of Portugal (southern Europe), recruited through a convenience and snowball

8. The major research mentioned here was supported by a grant for a doctoral-level program at the Institute of Social Sciences of the University of Lisbon (Portugal) from FCT, the Portuguese Foundation for Science and Technology (Ref. SFRH/BD/38679/2007), and supervised by Ana Nunes de Almeida (ICS-UL).

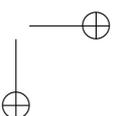
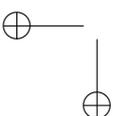


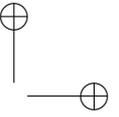


sample. Individuals belonged to different family arrangements (e.g., nuclear and single-parent families) for a minimum of two years, and had at least one small child between the age of 3 and 14 years old. Data were collected in 2009; interviews were audio recorded and transcribed *verbatim* into text, and then explored through a thematic and structural content analysis following mainly the Laurence Bardin's methodological guidelines (Bardin, 1977) adapted to the informatics environment (Gibbs, 2002). Regarding the technical procedure, the content analysis was performed using ©NVivo, a QSR's software.

In the text that follows, results on emerging themes and issues are presented through the form of contextualized narratives, according to which the interviewees' accounts are not isolated from the broader context in which they arise. A thick, rich description is the procedure used in validating data (Miles & Huberman, 1994). While the researcher brings into text rich and vivid descriptions of the setting, the participants and selected themes, in this case recurring whenever possible to *verbatim* transcripts; credibility is also established through the lens of the readers themselves, "who read a narrative account and are transported into a setting or situation" (Creswell & Miller, 2000, p. 129). Consistent with this approach, specific characteristics of the informants, their former and sometimes actual families, will be summarized and pointed out case by case, whenever it seems relevant to add richness to the presented narratives.

The point in bringing into this paper an illustration case is based on the heuristic power behind such a universal event of the Christmas celebration. Just as for many of the potential readers of this text, all the participants in the mentioned study annually celebrate Christmas. For all of them, it is "unthinkable" not to do it, or doing it in "commercial," "impersonal" places or away from their families. In fact, in the studied sample, Christmas embodies the concept of family in a broader sense: present, past and in some cases an idealized one. Christmas is the time when the family gathers and meets in celebration. It combines time, space and emotion. In the description of their Christmases, participants tend to strengthen the representation around a moment of family reunion, in which all its members – parents, children and grandchildren – come together in joy. The hegemonic representation around Christmas also includes the Christmas dinner, gathering the entire family around a big table, eating and drinking in both diversity and excess. Besides the excitement of the





moment, adjectives like “normal” and “traditional” usually arise to describe Christmas. Respondents do tend to consider their own Christmas as trivial, somehow equal to all the others. Even so, this *emic* perspective on a universal Christmas contrasts with the *etic* perspective that I found when analysing data in detail⁹.

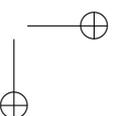
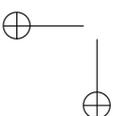
Not surprisingly for a sociologist, behind these hegemonic representations, the data unveils different ways of experiencing Christmas. Departing from a categorical analysis in which I started to gather accounts of the event of Christmas, more specific data analysis allowed me to come to an understanding pattern of the experience of Christmas in the studied sample. Throughout the section that follows, I present these categories. My point is to bring evidence that categories are not simple “drawers” deprived of meaning where the researcher fits reality. Categories emanate from data and always need to be put together with them in order to make sense and to be heuristic to that same reality.

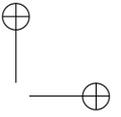
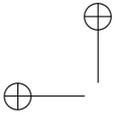
Moreover, I argue that writing is the final yet holistic tool that enables one to dive into data and to unveil their multiple layer meanings. The qualitative researcher is, therefore, a “bricoleur and quilt maker” (Denzin & Lincoln, 2000, p. 3). Furthermore, writing “is not just a mopping-up activity at the end of a research project. Writing is also a way of ‘knowing’ – a method of discovery and analysis. By writing in different ways, we discover new aspects of our topic and our relationship to it” (Richardson, 1994, p. 16). This author adds:

Unlike quantitative work, which can carry its meaning in its tables and summaries, qualitative work depends upon people’s reading it. Just as a piece of literature is not equivalent to its “plot summary”, qualitative research is not contained in its abstracts. Qualitative research has to be read, not scanned; its meaning is in the reading.” (Richardson, 1994, p. 517).

As announced in the epigraph that serves as a motto to this paper, illustration cases of categories are brought in through four different tales of the lived experience on Christmas as family practices: “Running Away for Ch-

9. This appears to be characteristic of the rituals classified as “family celebrations” (Wolin and Bennett, 1984). The same regularity was found by Melanie Wallendorf and Eric J. Arnould (1991) concerning the study of the Thanksgiving Day in the USA.





ristmas,” “Getting Trapped by Christmas,” “Getting Trapped in Christmas,” and “Running Away from Christmas.” Whether these tales give voice to the participants’ experiences, its selection is already an empirical finding of data analysis and, therefore, a scientific output on its own right.

Tale #1: *Running Away for Christmas*

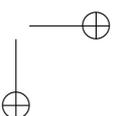
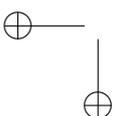
The idea of Christmas as a “family feast” is so powerful that families strive to invite and to add in the Christmas’ Eve those “who have nowhere to go,” distant relatives and even non-relatives with whom they build a “fictive kinship” (Wallendorf & Arnould, 1991, p. 22) purposely for that day. For instance, at the house of Maria do Carmo¹⁰, one of my interviewees, a friendly widow always joins in; for Martas’ Christmas, regularly comes the divorced mother of a cousins’ wife; Marina invariably spends Christmas’ Eve with a cousin that is an only daughter; lastly, Filipa always welcomes a friend or another who is alone by that time. Families do struggle to ensure the values of inclusion and generosity, while solving the “delicate issue” of people without family or of those whose family cannot guarantee them the culturally “imposed” Christmas Eve.

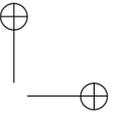
Indeed, rare are the individuals who overtly assume having no Christmas. In this regard, the unique experience brought up by the interviewees was the one reported by Ricardo. Ricardo is 38 years old¹¹ and he is the only son of a single mother emigrated in Switzerland. Until adulthood, he has always lived in Portugal with a maiden aunt. By the time he was interviewed, he still remembered the presence of his maternal grandmother, who died relatively early during his childhood. As for his mother, she came to Portugal occasionally. Without a father or mother nearby and with no grandparents or cousins, most of Ricardos’ Christmases were spent only with this maternal aunt, who raised him to adulthood. Without a Christmas to be called of *his own*, he was used to spend the Christmas’ Eve running *away* for looking at others’ Christmas. The following description is as illustrative as impressionist on such a scenario:

I had a ... I don’t know how to name it ... I enjoyed on Christmas’ Eve to go through the streets. We [Ricardo and his aunt] always

10. All the interviewees and relatives’ names used hereafter are pseudonyms.

11. Ages and chronological data used hereafter relate to 2009.





had a car; we went driving, and then it was circling the block to see the movement around. The last people on shopping, hurrying before dinner... Before the Christmas' Eve supper. Somehow between eight and ten o'clock. To see all that motion ... I liked to see that! My aunt drive and... either we stop the car, and we saw the people entering the shops, running...

– Ricardo

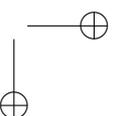
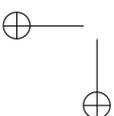
While Ricardo yearly ran towards a Christmas he never had, other interviewees end up being trapped by “the spirit” of Christmas. The following tale illustrates such cases.

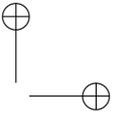
Tale #2: *Getting Trapped by Christmas*

Often, individuals leave their homes to celebrate Christmas, away to join family living abroad. In the specific case of the individuals I interviewed, this happens with the majority of them given their young average age¹², on the one hand, and on the other hand, because most of them still have at least one of their parents or in-laws alive, thus making them “guests”, either by one or the other side of the family. In fact, the metaphor of an alternating Christmas, either for years, for days or meals is frequent when describing Christmas. To the question “where do you usually spend Christmas' Eve?”, the responses are “all different, all equal”: “one year is at one side; another year is at the other side”, “one year at the in-laws' home, another year at the parents' home, and goes around”, “one year with my family, another year with my wives' family”; “Christmas Eve at one side and then Christmas Day at the other”, “if we spend the evening with ones, we spend the day with the others”, “Christmas Eve usually is with my in-laws, and the Christmas Day is at my parents”; “we have lunch at one side, and we have dinner with the other”, “one year Christmas' Eve with my parents and Christmas lunch is with the others, and next year we change”. Underlying Christmas, principles of alternation and rotation do remain, thus helping to deconstruct the over-idealized image of a steady family around the Christmas' Eve (Caplow, 1982).

In the words of some interviewees, Christmas starts long before the 24th of December. Christmas begins with the anticipation of the departure, with the

12. The mean age of the interviewees was 38 years-old.

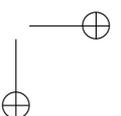
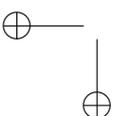


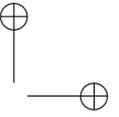


preparation of the night, with the shopping, the cooking or the gathering. As Kaufman argues (2005), anticipation of Christmas is, in fact, one of the most distinctive features of this family ritual. This happens with the idealization around the “Christmas’ spirit” that gradually penetrates into the places and peoples, by the decoration of houses and streets, the music that crosses spaces, the exchange of congratulations’ happy holidays, the excitement of shopping and the movement of commercial spaces. Hence, mediated by the media, the social construction of Christmas and its multiple “atmospheres” (Mason & Muir, 2012, 2013) appears as inevitable and impossible to escape from it (Pleck, 2000).

The positive and idealized image around Christmas is such that the interviewees always undervalue the feeling of “running” even if admitted. Alternatively, justifications such as “it is worthwhile”, “it has to be that way”, or “it is part of it” are brought to the discourse as a way to deal with the “distress”, “tension” and “the dark side” associated with such moments culturally constructed as positive ones (Gillis, 1996). Yet the assumption that the experience of Christmas is more characterized by the pressure and lack of time rather than enjoyment has to be put into question as some individuals end up *trapped by* “the spirit” of Christmas. António is one of such cases. He describes the walking for Christmas with such poetry and romanticism that reality seems to merge idealization. António is 41 years old; he is married for 15 years and father of two boys aged 13 and 10. Working in a bank in the city, he always benefits from the possibility of joining with his parents and in-laws at the village two days before Christmas:

I usually take off two days before Christmas, and I like to go [to the village] by the 22nd, 23rd... Why? Because there we have two obligations. It has turned out an obligation, and it delights me very much. The store my father owns comes from my grandfathers’ time and it is the oldest in the village... For many, many years, the Christmas’ storefront *décor* was made of chocolates and sweet-stuff but then, well... started to fall into disuse because of the heat and all that. And Christmas’ crib... Everyone made their own Christmas’ crib... We have a very large crib, made of very old parts and very beautiful. And my father is also very pleased, and he has all the skills to build it perfectly. So, when





the kids started to value it and to see and stop disturbing, or even touching careful not to break anything, we started this ritual that I adore; on the 23rd I take them out [the children], I go with them to the countryside to collect natural moss. [...] After we return, we get sand, and then we spend the evening entertained and all amused, unwrapping piece by piece... The Three Wise Men, the lambs, the chapel, the shepherd, the Child Jesus and so on; we electrify the chapel... we spend a wonderful afternoon and evening: me, my dad and the kids, building the entire Christmas' crib, nowadays no longer in the window, rather at home...

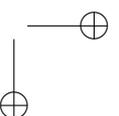
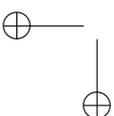
– António

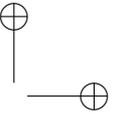
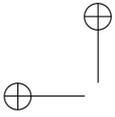
Contrary to António, who pleurably is getting trapped by Christmas, the next tale illustrates how, some other individuals, end up getting trapped in Christmas.

Tale #3: *Getting Trapped in Christmas*

Despite generally appreciating Christmas, experiencing and anticipating the family reunion, the parents I interviewed did not hesitate in stating that “Christmas is for children”. Firstly, because the image around “the Christmas of my childhood” has a very strong discursive power around the adults’ representation on Christmas, either by identification or rejection (Rosenthal & Marshall, 1988). The memories associated with childhood are often triggered from this moment, due to the geographic mobility usually implied, namely by leaving for the village or due to the arrival of grandparents, uncles and cousins. Fast, the whole family gathered and the spectrum of relationships highly broadened: on one hand, fathers, uncles and grandparents; on the other, brothers, cousins and friends who came together. Additionally, when remembering childhood adults often refer to the games and plays, as well as the cheerful atmosphere of celebration and the anticipation of the opening of the Christmas gifts (Favart, 2005). Secondly, because as parents with small children, these adults’ Christmas is largely focused on anticipating and preparing a Christmas for them, for the children.

Aware of the commercialization around Christmas, the interviewees’ accounts stress a certain “containment,” as a way to avoid excess consumption

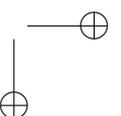
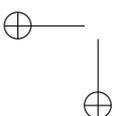


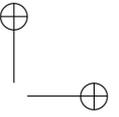
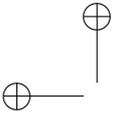


and to preserve “the spirit of Christmas”, referring a reduced and personalized purchase of gifts. Children constitute the major exception in this discourse. Therein, a certain obligation and surprise associated with gift giving constitute not the exception but the rule. Some adults even say that they “only buy gifts for the kids, for anyone else.” In fact, all the parents I interviewed admitted that offering children Christmas gifts is the *sine qua non* of the children at Christmas. By the end, opening the gifts is the climax of Christmas for children.

The offer and the exchange of gifts to children relates directly to concerns regarding the overconsumption at Christmas season. Parents accuse the wider consumer society, crossing the children’s every-day life with appealing advertising, creating in them the desire for having more and more toys, quickly overtaken by the desire of others, new and different ones. Moreover, parents also point to a certain imitation effect that arises from the contact children have with each other, either at school with the peer group or in the family with brothers, sisters and cousins. Yet parental concern is not so much about the monetary value of the gifts, rather to “make a wish” or “achieve the child’s dream.” While this argument is used to say that the child will not like a certain gift just because it is too expensive; it also serves to say that regardless of the price, parents will be willing to pay far as possible, feeling frustrated if despite the efforts, they cannot achieve the happiness of the children (Kaufmann, 2005). By the end, this means that if what really counts is not how much one spends, rather how one listens to the tastes and desires of children; this ultimately makes children accumulate various gifts. Joana, aged 35, lives in a *de-facto* union for over eight years. Being the mother of two boys, Afonso with six years old and Rodrigo with only one year old, Joana particularly points out how difficult it is to escape from the pressure that the consumption behaviour of one child in Christmas exerts on each other. The following quote is paradigmatic of the context in which unlike her earlier words, she ultimately ends: *trapped in Christmas*.

[...] Afonso doesn’t have to have the computer console just because... he might even have it, but not just because his cousin has it, it is because he deserves to have it, or because we want to give it to him. Maybe in a few years... It doesn’t have to be now, just because the other one [his cousin] has one [...]. I don’t





understand. Because it is our fault! The adults, right? I do not understand why children have thousands of toys... Afonso happily entertains himself with almost all of them, yet... why do we spend so much money on a toy if later he only plays fifteen days with it? [...] I remember once we went shopping, and I was looking for the tree house of Tarzan¹³. There were two trees. There was a larger one that cost around 50 euros. It is not about the money, because we gave a lot of things to Afonso. And those things put together represent a lot of money. He loves dinosaurs; we gave him a huge dinosaur of a collection that we are doing for him; we gave him many books, games; we gave him a lot of things. However, I wanted to buy him the tree because *he wanted* a tree. Nevertheless, there were two trees. [...]. 50 euros! That is a lot of money! For me, it is a lot of money compared at the time of enjoyment, right? Because for him it is the same. He even does not know the difference from one to another. Then I bought him the other one, which cost about 20 euros. [...] He has won that tree with the Tarzans' house; he had the Tarzans' aircraft and the Tarzans' truck. How could he be more delighted?

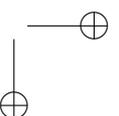
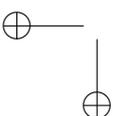
– Joana

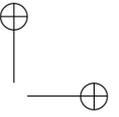
While this quote unveils how Joana ended up completely trapped in the past Christmas, offering countless gifts to his son; it opens up space for the question behind the last tale: is it possible to run away from Christmas?

Tale #4: *Running Away from Christmas*

Few events turn Christmas a less happy or running not so well occasion. Major examples have to do with the illness and death of family members, and conjugal dissolution. Significantly, death usually brings into the Christmas celebration a certain feeling that “things will never be the same again”. This happens because Christmas is also a time for institutionalization of change and to (re)make the boundaries of the family (Coltrane, 1998), either through

13. Tarzan is a fictional character created by the American writer Edgar Rice Burroughs in the novel *Tarzan of the Apes*, 1912. Its image and everyday scenes are commercially exploited in numerous toys sold worldwide.



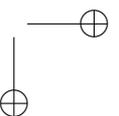
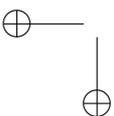


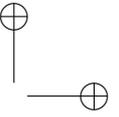
the inclusion of new members (imported through dating, marriage or family reconstruction), or the loss of others (due to separation, divorce or death).

Regardless the suffering of passing through the death of a significant other, this event does not appear sufficient enough to question the celebration of Christmas; even so, it usually compromises the ways, times and spaces where it is celebrated. It implies, for instance, to re-organize the place of the celebration and this might involve changes in the number and composition of either hosts or guests. As every situation is certainly different, the solution seems to depend heavily on the proximity in time between those happenings and the 24th of December.

Eduardo, aged 37, is married for 12 years and father of a girl with 10 and a boy with 7. His wife, an only child, had passed recently by the death of her mother of whom she was very close, both physically and emotionally. In the Christmas that followed, they choose to get out of the country. By travelling to London, Eduardo admits they *ran away from* Christmas.

[...] [W]e did not stand spending Christmas here [in the hometown]. Because Christmas has always been the party in which we joined the whole family... A year in my house, another year at my parents' house, another in the house of my in-laws, another one in the house of my wife's uncles... and *the entire family* was gathered. The whole family went there, my parents, her parents, their aunts, the cousins' in-laws... we gathered all... at my house, I gathered dozens and dozens of people. Families... several families gathered there. Although we all knew each other... Then, at Christmas, I always dress myself, this year not anymore, but I always dressed as Santa Claus. Then it was that party... especially for the kids... the coming of the Santa Claus. There was singing, songs, always with great joy. Essentially with joy. With the death of my mother-in-law, this Christmas, we could not bear, not me, but the daughter, my wife... so the option was... 'we are not going to spend Christmas here, let's go out, let's go on a trip!' And we ran away... 'Where are we going? Where to?...' we went to the Internet and... 'where are we going? Where is it cheapest?' In that time of the year... so we went to London. My wife had already been there twice; I had never been in London. So we went





five days to London. [...] We went to visit London, not the Christmas in London! Our Christmas dinner was at McDonald's to eat a... [laughs] and the Christmas spent unnoticed. For us... this year, the fact of being in a distant city, so touristic, we had gone sightseeing, so... it was... a normal day. We did not associate it... not my children, we didn't associate it with Christmas. The next day, the Christmas Day, the 25th... everything was closed [laughs].

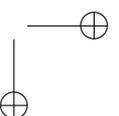
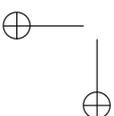
– Eduardo

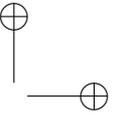
Determined to run away from Christmas last year, the confrontation with the “closed” in the shop fronts was, after all, the subtle message that Eduardo and his family needed to realize that, despite being miles apart from Portugal, it was definitely impossible to run away from Christmas.

From consensual to some apparently contradictory practices, from the individual level into the family and social dimension, from instrumental to expressive behaviour, the illustration brought above turned out the seemingly well-known and “visible” reality of the experience of Christmas celebration in another one carried with multiple, veiled and able to further interpretations. By the end, bringing together these four tales clearly reinforces the categorical analysis as both fruitful and somehow endless matter of data exploration in search for hidden and multilayered meanings.

The Yet to Come: On Labour and Immersion on Data as Cross-Cutting Roads into the Future

In this text, I argued that categorical analysis is (still) a useful and powerful tool to analyse old and new objects, at the same time it can be rediscovered to overcome some of the challenges faced by the researchers working across many fields and disciplines. Moreover, I argued that there is no relevant distinction between “human-based” and “computer-based” content analysis. In fact, the two kinds of content analysis greatly depend upon the researcher engagement on data. Consistently, lastly, I also argued that closely accompanying all situations related with data gathering and processing is certainly far more important than the resources we use to do the analysis, either pencil or laptop.

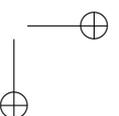
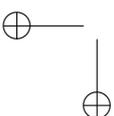


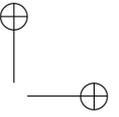


The example I brought in the preceding section illustrates how categorical analysis can be a way of discovering old and new meanings beyond the more seemingly self-evident experiences of the social world, such as the Christmas celebration. For that specific study, all the interviews, its transcription and data analysis were undertaken by a single person. The researcher was at the same time the interviewer, the transcriber, the analyst and the author writing the final narratives. While I acknowledge not all studies comprise small researches like the one I carried out, this text would certainly help to consolidate the idea that content analysis is a holistic and major task that cannot be done without intense labour as a condition to immerse into data.

Whereas the case I explored here was based on transcripts from audio records of face-to-face interviews, the analysis could be expanded into many materials such as magazines, advertisements, newspapers, radio or TV, personal video recordings, or social media content for analysis. The recent challenges posed by the new media, and the related availability of data did not weaken the power of categorical analysis; on the contrary, speed, instantaneity and accessibility are being looked up as an unknown test to overcome in the view of data analysis. For instance, by the time this text was firstly written (August 2013), QSR's NVivo latest version was being advertised as allowing to import and auto coding web content from social media sites (e.g., Twitter, EverNote and Facebook), gathered through NCapture, a web browser extension, one may choose to install with that software. Additionally, NVivo was, moreover, promoting the possibility of importing and auto coding data sets (including the .xls files generated by SurveyMonkey® and other online survey administration tools), thus opening up the potential for analysis of fixed-response and open-ended survey questions.

As I argued before (Costa, 2013), in the present, but also in the future, the expression CAQDAS should be understood beyond the software specifically developed for treatment and analysis of qualitative data, and encompass multiple tools designed to assist the researcher in different times and stages of the research. Beyond the traditional metaphors around the craft of the qualitative researcher, namely as a "choreographer" (Janesick, 2000, p. 379), "maestro" (Mason, 2002, p. 73), and "bricoleur" (Denzin & Lincoln, 2000, p. 4), I suggest using the metaphor of the *geek researcher*. In fact, the new research context impels the researcher to identify, use and take advantage from the available software in order to deal with the problems and challenges he/she faces





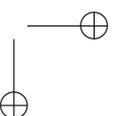
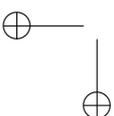
throughout the research. Because these challenges are always different as new researches arise, so the researcher should keep seeking for new answers and, eventually, to help the software development based upon his or her field of specialization.

It is true that the future is uncertain as social reality is not static, rather dynamic, and as the software developers are always advancing new versions and extra features. In fact, there is no more up-to-date handbook on the issue than the software web pages, which detail the novelty and practice applications of the various packages as a brand-new version emerges in the market. As digital is more and more a way of life, in numerous companies' websites, discussion groups' pages and even in YouTube, there is an increasing amount of information that should not be overlooked. Therein, answers for questions or unresolved doubts are constantly being provided, tutorials turned available, detailed discussions on hot topics entered on, and open courses or webinars being organized.

Certainly, the future brings an even easier, intuitive and friendlier way of using qualitative software; I have no doubt on it. Notwithstanding, reliability and validity would remain for some years as the two main criteria used in evaluating the "truth" and the "quality" of content analyses drawn from raw material regarding people, phenomena, events, experiences, actions and its latent meanings. In the major framework of research projects or when submitting to peer-reviewed publications, categorical analysis is definitely a technique that remains attractiveness as allowing the researcher to maximize the descriptive richness of data anticipating the ways it is linked with the readers' understanding of the social world around. After all, the reader – whoever and wherever he or she is – is it ultimately addressee and judge.

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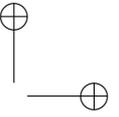
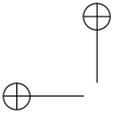
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