

## The problem of invisibility and the eloquence of small things: reflections on the strengths of qualitative research

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### How to quote this article:

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I was introduced to the Brazilian academic world - its liveliness and its warmth - in September last year, when invited by the Brazilian Universities of Pelotas, Ribeirão Preto and Porto Alegre to a series of lectures on qualitative research, related to the translation into Portuguese of a work of mine <sup>(1)</sup>. Each journey leaves imprinted in the memory of those who join it a set of memories, in which time intervenes, altering its intensity and creating new - sometimes unexpected - combinations. This happens even in the most austere version of the trip, the study trip.

Thinking about my stay in Brazil and the reasons that led me there, two images strongly emerge in my memory, the poetry of Mário Quintana and the beautiful song of Antônio Carlos Jobim, *Águas de março*. Once lying in my thoughts and, now that I'm writing, I find at my desk the collection of poems by Mário Quintana *A cor do invisível* and Elis Regina & Tom Jobim's CD, which contains the extraordinary interpretation of *Águas de março*. After my classes at the University of Porto Alegre, I visited Mário Quintana House of Culture, built at the Majestic Hotel, which, for many years, had the gaucho poet as a guest. Among his collections of poetry, one in particular caught my attention: *A cor do invisível*, which, as soon as I returned to Italy, I read its translation by Natale Fioretto. I searched in the text index for the poetry, or at least the poetry explicitly dedicated to the invisible, but I did not find it. At first I felt disillusioned, but afterwards I understood that, from that invisible, it was possible to take only the shadow, to intuit its color, and that every explicit definition - though poetic - would have betrayed the spirit of that work. The color of the invisible is harvested by immersing itself in the simple things spoken by Quintana's poetry, and then directing the gaze beyond, in the tension towards its meaning. Something similar happens when listening to *Águas de Março*, which, in the opinion of Chico Buarque, is "the most beautiful samba in the world"<sup>(2)</sup>. As it is known, *Águas de Março* comprises, in a quick succession, a series of images that portray the Brazilian daily life: the stick, the stone, a piece of bread, the design of the house, the broken car and much more. In Tom Jobim's lyrics, we find the same interest for the small simple things, at the center of Quintana's poetics, but also an interesting - at least in the perspective of this reflection - call to the theme of invisibility. Among the splendid images of *Águas de Março*, we find that

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of Matita-Pereira, a tricky character from Brazilian folklore, which wears a magic hat that, like the Ring of Gyges of which Plato speaks in *Republic*, allows him to become invisible. Well, the themes of invisibility and of small things, of their special importance, allow collecting the peculiarities of the qualitative research, of what I will deal later; however, first I think it is opportune to give a succinct definition of qualitative research.

Qualitative research is anything but a monolith, a compact set of research practices carved out in the same theoretical and epistemological field. Qualitative research is a plural set of research styles, different due to theoretical origin and research practices. Undoubtedly different from each other, these ways of doing research show important “family resemblances.” These resemblances, besides identifying the relevant features of qualitative research, help to recognize what differentiates it from quantitative research. For me, it seems that there are three traits of qualitative research in which this familiar resemblance is shown: the harmonization of the procedures for data construction with the context of their use; the close observation; and the multivocality of writing. In the qualitative research, the procedures for data construction assume different configurations according to the interactive context in which they take shape. The formulation of a question in an interview on how, in the course of an ethnographic research, the researcher will observe and, to some extent, participate in an interactive practice, will vary from time to time, harmonizing with the circumstantial changes of the area. To put it in a slogan: in the qualitative research, it is not the participants who need to adapt to the proposed method, conversely, it is the method that have to adapt to the participants. The second relevant characteristic of the qualitative research is its vocation to a close observation, to a research style that prefers the deepening of details for the reconstruction of a general picture, the intensive studies carried out in a reduced number of cases, instead of extensive studies. The last trait that deserves to be highlighted concerns the multivocal, polyphonic character of writing with which the results of a qualitative research are delivered to the reader. With few exceptions, the texts that produce the results of a qualitative research are based on a form of “orchestration” between the researcher’s voice and the participants’ voice.

The history of science, and therefore, the history of social sciences, is characterized by a constant confrontation with the paradoxical problem of the observation of the inexorable. An ontological and methodological node that science has faced by moving two levers, the one of technological development and the one of elaboration of conjectures, of “theoretical entities”, capable of uniting the observable to the unobservable. Increasingly powerful microscopes, the discovery of X-rays allowed medicine to see the infinitely small, to overcome the barrier of the epidermis and to see inside bodies. In Physics, the boundary between visible and invisible was progressively shifted; however, not even in the most mature science it was totally canceled.

In social sciences, where the lever of technological development has little penetration, the problem of studying the invisible retains all its relevance. It is not common to think about our research practices in this perspective, but in fact, what we know about society is based on reported information, on observable phenomena; however, much more consistently on unobservable phenomena. Behaviors, for instance, are observable, the sequence of gestures to make a bandage in a surgical wound, as well as the products of behavior: the enormous building of São Pedro’s mental hospital in Porto Alegre, the pictures of people still hospitalized in those walls. On the other hand, it is unobservable, invisible, everything that is inside the head of those who work in a mental hospital and of those who are admitted to it. The behaviors, beliefs, values and the meaning associated with their own actions by the afflict humanity of the patients and of those who share with them that space of care and custody. One might say: but, after all, if these are just beliefs, ideas, what impact may they have on the world? Well, we have learned from the classics that the impact is certainly relevant. In *The Polish peasant in Europe and America*, published in 1968, William Thomas and Florian Znaniecki<sup>(3)</sup> elaborate a fundamental concept for our work, that of “situational definition”, a cognitive category (the authors define it as attitude) which guides the actions of individuals. When deciding the course to be imprinted on one’s own actions, individuals do not react mechanically to the environment where they find themselves, but rather, how they represent it in their mind. Hence the famous “Thomas’ theorem”, which states that, if men define certain situations as real, they will be real in their consequences. If I am convinced that I can fly and decide to throw myself off the terrace, even if my belief in my flight capabilities is unfounded, its (tragic) consequences will be real. When a serious illness breaks out in the life of an individual, the way in which such experience will be experienced and the manner in which the patient re-establishes the fragments of his bruised identity will depend not only on the lacerations that the disease has inflicted on his body, but also on the manner in which he will represent his own condition, and will elaborate an explanation - cognitive and moral - of its emergence.<sup>(4)</sup>

Having access to these invisible territories is, therefore, fundamental and, by doing so, the social researcher adopts a *modus operandi* which has several analogies with the doctor from the 19th century. Devoid of the instruments of the contemporary medical technology that allow the observation of internal organs, the doctor from the beginning of the 19th century reached the diagnosis through a meticulous survey of the signs of the disease accessible to his eyes and of the symptoms reported by the patient. He took note, for example, of the condition of the skin and the mucous membranes, any postural changes, auscultated the chest to know the heart rate, and then asked the patient to describe the symptoms he/she felt, for instance, a feeling of continuous tightness in the chest or blurred vision. The signs and symptoms were then united so that, by successive exclusions (differential diagnosis), it was identified the syndrome, from that unobservable state, responsible for the detected signs and symptoms. The doctor could only count on a decidedly rudimentary set of instruments (usually a stethoscope and a wristwatch), so he concluded the diagnosis by activating a kind of “circumstantial knowledge”<sup>(5)</sup>, establishing a link between the observable states and the - invisible - condition of a diseased organ. In a similar way, the social researcher proposes to delineate the profile of a set of beliefs, to gather the meaning placed in the actions by combining a set composed of signs taken from behaviors and, mainly, from the language, through the interlocution resource. In this regard, it is worth remembering the words of the French anthropologist Dan Sperber<sup>(6)</sup>, which says the following on these subjects:

*It is impossible to describe a cultural phenomenon, an election, a mass, or a football game for instance, without taking into account the ideas of the participants. However, ideas cannot be observed, but only intuitively understood; they cannot be described but only interpreted*<sup>(6)</sup>.

By using this form of circumstantial knowledge, celebrated in the popular literature by the character of Sherlock Holmes, created by Conan Doyle, it emerges - clearly - a distinction between the doctor from the 19th century and the social researcher<sup>(7)</sup>. In a clinical appointment, it is reasonable to assume that the patient provides the doctor with all the cooperation he can, within his cognitive capabilities and the decency that sometimes involves the conversations about his own body and its functions. This degree of cooperation, of compliance, is far from being guaranteed in the context of social research. It is really difficult to believe that the people inquired about the way they see the world, their ideals or, being impossible to observe them directly, their habitual behavior, respond with the same degree of cooperation as they would have during a doctor’s appointment. The Canadian sociologist Erving Goffman<sup>(8)</sup>, who made interaction in everyday life the very object of study, eloquently documented that what matters the most to people in social interactions - and, therefore, in the interaction constituted with a specific research - is to “get out of trouble”, to avoid constraints or cause a bad impression, even if it is necessary to make a few adjustments in the answers given to an interviewer or to polish, under the indiscreet eye of an observer, the sharpest aspects of one’s behavior<sup>(8)</sup>. In short, it can be said that, in the study of social phenomena, the cooperation of participants is, at the same time, indispensable and uncertain.

And it is in this slippery terrain that the qualitative research offers an important contribution. Its distinctive features, in particular the harmonization of the context being studied and the close observation (see above), provide the researcher with a rich set of information on what he proposes to present, *but also*, on the degree of cooperation of the participants. In a discursive interview, the participants have to express themselves with their own words, build the speeches they provide to the researcher, and do not immediately put an “X” in a questionnaire. By composing their speeches, by giving a specific emotive coloring, the participants provide precious clues<sup>(5)</sup> on the degree of cooperation offered. With the repeated observation, typical of the ethnographic research, information on the degree of cooperation of the participants becomes even richer. The time spent together allows the researcher to put into use those investigative virtues studied by Jack Douglas<sup>(9)</sup>, that is, to learn how to overcome the barriers the participants raise to protect the borders of their inner world<sup>1</sup>. Moreover, the time spent together allows - sometimes, and not necessarily - the participants to attenuate the suspicions about the researcher and to feed a tenuous trust in him and, also in this case, the close observation, proper of the qualitative research, allows to verify, in that step change, and to reap the emergence of a stronger form of cooperation. To conclude this point, I affirm that the openness, the flexibility and the focus in a few cases proper of the qualitative research provide

<sup>1</sup> The adjective “investigative” does not refer to a police or disciplinary meaning of social research, but to investigative journalism, which Douglas sees emblematically represented by Lincoln Steffens, author of important reports on the political and economic corruption of America at the beginning of the last century. What Douglas encourages is, first of all, the adoption of a critical disposition, of a systematic skepticism about what the people involved in the study, and from whom we gain trust, tell us and allow us to observe. Douglas refers the core of this provision to a maxim: “there are much more dubious and immoral things than what appears to our eyes”<sup>(9:66)</sup>.

social research with the most promising instruments in the study of the invisible, thanks to the availability of a rich set and composed of information on the cooperation of the participants. So far, the echo of Quintana's suggestions and his effort to outline the color of the invisible.

The second part of the qualitative research, mentioned earlier, that of a close observation, more focused on details and on the nuances proper of a social context, drives it towards the world of the small things, evoked by Antônio Carlos Jobim. Qualitative research deals with the aspects, sometimes the most minutes, of daily life in the conviction that, as a Zen motto says: "a little thing is not a small thing". This vocation, which guides Tom Jobim's gaze toward a stone, a piece of glass or a thorn in his hand, endured the most common accusation directed at the qualitative research, that of being anecdotal<sup>2</sup>. In my deliberately distressed defense of the qualitative research, I do not intend to deny its anecdotal character, but to celebrate it. I will do this by proposing the reflections of Michael Quinn Patton collected in the fourth (and, so far, the last) edition of his manual *Qualitative Research & Evaluation Methods*<sup>(10)</sup>. Patton's thesis, which I make mine, is that an individual event, a small thing upon which one decides to focus attention may be particularly eloquent, may shed light to a set of extremely deep and widespread cultural traits. Patton convinces me by proposing a tale that takes us to colonial India.<sup>(10:32)</sup> The story is about what happened to Mrs. Montgomery who, one night, when returning home through a long road, preceded, as usual, by her servant, came across one of the most poisonous snakes in India. The servant, who had seen it, ordered the lady to stop; she did not listen to him and the servant was obliged to break the rule that prevented the servants from touching the body of their masters: he pushed Lady Montgomery back by placing his hand on her shoulders. Even though she knew that she owed her life to the servant, Mrs. Montgomery was determined to dismiss him, for he had disregarded the sacred rule which prevented physical contact between a servant and the master. It is evident that this is, indeed, a small thing, but it, nevertheless, speaks volumes about the culture of the English settlers of that time and their representation of the Indian population<sup>3</sup>. Good qualitative research moves in the direction indicated by Patton, to the research of short stories, to the reconstruction of minute events, from circumscribed social contexts - in a word: from small things - to whom to entrust the task of throwing light - with authority - on more comprehensive social phenomena. And many times it is successful.

<sup>2</sup> Patton relates one of the most iconic expressions of this criticism to Benson's words: "The plural of anecdote is not evidence"<sup>(10:31)</sup>.

<sup>3</sup> Technically, the tale mentioned in the text is configured as a "critical case"<sup>(11:80-3)</sup>.

## ■ REFERENCES

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## **ERRATUM**

In the article “The problem of invisibility and the eloquence of small things: reflections on the strengths of qualitative research”, published in the volume 39, 2018: DOI: 10.1590/1983-1447.2018.82654 and identification e82654.

In paragraph 1, where it was written: “[...] when invited by the Brazilian [...]”

Should read: “[...]when I have been invited by the Brazilian [...]”

In paragraph 1, where it was written: “[...] who join it a set [...]”

Should read: “[...] who carries out it a set [...]”

In paragraph 2, where it was written: “[...] Once lying in [...]”

Should read: “[...] At first, put beside in [...]”

In paragraph 2, where it was written: “[...] I find at my desk [...]”

Should read: “[...] I find on my desk [...]”

In paragraph 2, where it was written: “[...] A cor do invisível, which [...]”

Should read: “[...] A cor do invisível (The colour of the invisible), which [...]”

In paragraph 2, where it was written: “[...] I read its translation by Natale Fioretto. I searched in the text index for the poetry [...]”

Should read: “[...] I read I looked in the book for the poetries, or, at least for the specific poetry [...]”

In paragraph 2, where it was written: “[...] I felt disillusioned [...]”

Should read: “[...] I felt disappointed [...]”

In paragraph 2, where it was written: “[...] in a quick succession [...]”

Should read: “[...] in quick succession [...]”

In paragraph 2, where it was written: “[...] a tricky character from [...]”

Should read: “[...] a goblin from [...]”

In paragraph 2, where it was written: "[...] allow collecting [...]"

Should read: "[...] allow recognizing [...]"

In paragraph 2, where it was written: "[...] to give a succinct [...]"

Should read: "[...] to give a short [...]"

In paragraph 3, where it was written: "[...] epistemological field. [...]"

Should read: "[...] epistemological matter. [...]"

In paragraph 3, where it was written: "[...] different due to theoretical origin [...]"

Should read: "[...] different by theoretical ascendancy [...]"

In paragraph 3, where it was written: "[...] show important "family [...]"

Should read: "[...] show relevant "family [...]"

In paragraph 3, where it was written: "[...] help to recognize [...]"

Should read: "[...] help to recognise [...]"

In paragraph 3, where it was written: "[...] For me, it seems that there are three traits of qualitative research in which this familiar resemblance is shown: the harmonization of the procedures for data construction with the context of their use; [...]"

Should read: "[...] Three are - in my view - the traits of qualitative research in which it is possible to recognise this family resemblances: the harmonisation of the data collection procedures with the context of their use (context sensitivity) [...]"

In paragraph 3, where it was written: "[...] The formulation of a question in an interview on how, in the course of an ethnographic research, the researcher will observe and, to some extent, participate in an interactive practice, will vary from time to time, harmonizing with the circumstantial changes of the area. [...]"

Should read: "[...] The wording of a question, in an in-depth interview; the way in which, in an ethnographic research, the researcher will observe and, somehow, participate in the interactive practices in the field, will vary from time to time, by harmonising with the changing contingencies of the field [...]"

In paragraph 3, where it was written: "[...] of a general [...]"

Should read: "[...] of an overall [...]"

In paragraph 3, where it was written: "[...] carried out in a [...]"

Should read: "[...] carried out with a [...]"

In paragraph 3, where it was written: "[...] texts that produce [...]"

Should read: "[...] texts that present [...]"

In paragraph 4, where it was written: "[...] observation of the inexorable [...]"

Should read: "[...] observation of the unobservable [...]"

In paragraph 4, where it was written: "[...] elaboration of conjectures, of [...]"

Should read: "[...] elaboration of conjectures about [...]"

In paragraph 4, where it was written: "[...] capable of uniting [...]"

Should read: "[...] capable of binding [...]"

In paragraph 5, where it was written: "[...] has little penetration [...]"

Should read: "[...] has little grip [...]"

In paragraph 5, where it was written: "[...] but in fact, what we know about society is based on reported information, on observable phenomena; however, much more consistently on unobservable phenomena. Behaviors, [...]"

Should read: "[...] but actually, what we know about society is based, for a little quota, on observable phenomena, but the bulk of our data are underpinned on unobservable phenomena. Behaviours, [...]"

In paragraph 5, where it was written: "[...] products of behavior [...]"

Should read: "[...] products of behaviours [...]"

In paragraph 5, where it was written: "[...] people still hospitalized [...]"

Should read: "[...] people still hospitalised [...]"

In paragraph 5, where it was written: "[...] who are admitted to it. The behaviors [...]"

Should read: "[...] who are confined in it. The behaviours [...]"

In paragraph 5, where it was written: "[...] published in 1968 [...]"

Should read: "[...] published in 1918 [...]"

In paragraph 5, where it was written: "[...] of "situational definition", a [...]"

Should read: "[...] of "definition of situation", a [...]"

In paragraph 5, where it was written: "[...] but rather, how they represent it in their mind [...]"

Should read: "[...] but rather to their mental representation of the environment/context [...]"

In paragraph 5, where it was written: "[...] on his body, but also on the manner in which he will represent his own [...]"

Should read: "[...] on his/her body, but also on the manner in which he/she will represent his/her own [...]"

In paragraph 6, where it was written: "[...] meticulous survey [...]"

Should read: "[...] meticulous observation [...]"

In paragraph 6, where it was written: "[...] He took note, [...]"

Should read: "[...] The doctor took note, [...]"

In paragraph 6, where it was written: "[...] the syndrome, from that [...]"

Should read: "[...] the syndrome, that [...]"

In paragraph 8, where it was written: "[...] cooperation he can [...]"

Should read: "[...] cooperation he/she can [...]"

In paragraph 8, where it was written: "[...] about his own body [...]"

Should read: "[...] about body [...]"

In paragraph 8, where it was written: "[...] to "get out of trouble", to avoid constraints [...]"

Should read: "[...] to "save one's own face", to avoid embarrassments [...]"

In paragraph 9 where it was written: "[...] what he proposes to present [...]"

Should read: "[...] what he/she intends to study [...]"

In paragraph 9, where it was written: "[...] words, build the [...]"

Should read: "[...] words, compose the [...]"

In paragraph 9, where it was written: "[...] virtues studied [...]"

Should read: "[...] virtues underlined [...]"

In paragraph 9, where it was written: "[...] and not necessarily [...]"

Should read: "[...] but not necessarily [...]"

In paragraph 8, where it was written: "[...] to verify, in that step change, and to reap [...]"

Should read: "[...] to ascertain this step change, and to reap the fruits of [...]"



In paragraph 10, where it was written: "The second part [...]"

Should read: "The second trait [...]"

In paragraph 10, where it was written: "[...] deliberately distressed [...]"

Should read: "[...] deliberately passionate [...]"

In paragraph 10, where it was written: "[...] research of short stories [...]"

Should read: "[...] research of anecdotes [...]"

In the REFERENCES, where it was written: "3. Thomas WI, Znaniecki F. Il contadino polacco in Europa e in America (1918-1920). Milão: Comunità; 1968."

Should read: "3. Thomas WI, Znaniecki F. The Polish peasant in Europe and America, (1918-1920). University of Illinois Press, 1996."

In the REFERENCES, where it was written: "7. Eco U, Sebeok TA. O Signo de três, São Paulo: Perspectiva; 2008."

Should read: "7. Eco U, Sebeok TA. The Sign of Three: Dupin, Holmes, Peirce, Indiana University Press, 1988."

In the REFERENCES, where it was written: "8. Goffamn E. A representação do eu na vida cotidiana, Petrópolis: Vozes; 2018."

Should read: "8. Goffamn E. The Presentation of Self in Everyday Life, Anchor, 1959."