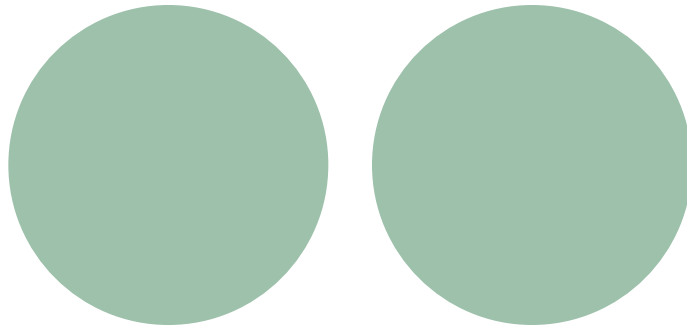


Using Excel to Organize Qualitative Data for Analysis



Susan Eliot
Eliot & Associates



Overview

- The Qualitative Challenge
- Organizing vs. Analyzing
- Caveats and Assumptions
- The End Goal
- Data Preparation
- Excel: Step by Step
- Coding and Categorizing
- Estimations and Comparisons
- Cautions and Encouragement



The Qualitative Challenge

- Non-numerical data
- Thick description
- No formulas; no rules
- Human factor
- Unique studies

Organizing vs. Analyzing



- Why organize?
- Why analyze?
- Who does the thinking?
- What about commercial qualitative software packages?



Organizing vs. Analyzing

- “ *The analysis of qualitative data involves creativity, intellectual discipline, analytical rigor, and a great deal of hard work.*”

M. Q. Patton



Caveats and Assumptions

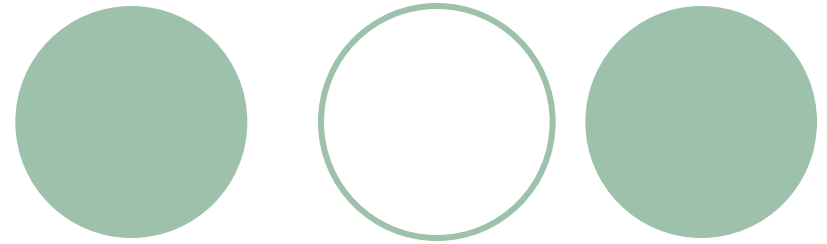
Caveats:

- Not for every type of project
- Every feature not applicable to every project
- Many more possibilities

Assumptions:

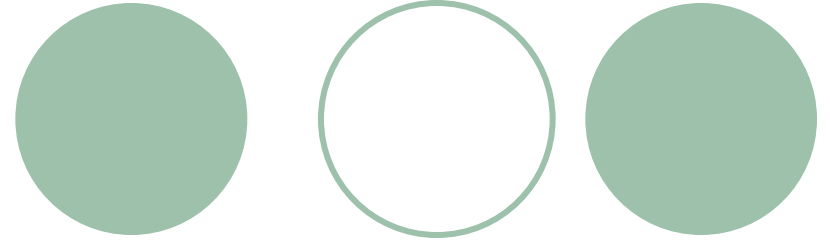
- Quality data collection
- Accurate transcripts
- Structured conceptual framework
- Inductive analysis

The End Goal



Microsoft Excel-- Dental Flossers					
X File Edit View Insert Format Tools Data Window Help					
	A	B	C	D	E
1	PID	Code	Responses		
2	1.2	A	My dentist had a particular influence on me.	Coding Key	
3	1.3	B	My hygienist.	A	dentist
4	1.3	C	My kids: I need to set a good example.	B	hygienist
5	1.5	C	My mom is living proof; she's 50 and her teeth are in great shape.	C	family
6	1.6	C	My sister-I don't want my teeth to look like hers.	D	TV
7	2.1	A	Family dentist	E	friend
8	2.3	E/B	My friend who's a dental hygienist and teaches at the University.		
9	2.4	A	My dentist tells me I have great teeth so I want to keep them that way.		
10	2.5	C	My mother-in-law has had the greatest influence, believe it or not		
11	2.6	A	My dentist-he's so good-looking.		
12	2.6	D	TV commercials for teeth whitening.		

Data Preparation



- Transcribe audio data
- Add notes, reflections
- Clean data
- Prepare for Import

Excel Step by Step



- Design spreadsheet
- Create template
- Develop workbook
- Enter data
- Split into “meaning units”
- Enter identification coding
- Custom format worksheets

Excel Step by Step



- More on “meaning units”
 - As opposed to sentence units or paragraph units
 - Presumes data can be broken into manageable, somewhat regular units
 - Horizontal hierarchy: each meaning unit is treated equally in analysis
 - Most useful for constant comparative analysis

Coding and Categorizing



- Read; familiarize
- Look for patterns, categories, themes
- Constant comparison
- Develop inductive codes
- Code and categorize
- Extend, change, collapse or discard categories
- Code again; re-categorize
- Multiple coders



Coding and Categorizing

*“The qualitative analyst’s effort at uncovering patterns, themes, and categories is a **creative process** that requires making carefully considered judgments about what is really significant and meaningful in the data.”*

M. Q. Patton

Coding and Categorizing



“The analyst moves back and forth between the logical construction and the actual data in a search for meaningful patterns.”

M. Q. Patton

Coding and Categorizing



Codes

- Inductive codes
- A priori codes
- Co-occurring codes
- Face sheet codes
- Coding hierarchies



Coding and Categorizing

“The best advice I ever received about coding was to read the data I collected over and over and over. The more I interacted with the data, the more patterns and categories began to jump out at me.”

Anonymous qualitative list serve participant



Comparisons and Enumerations

- Comparisons using Excel
 - Inter-group comparisons
 - Segmented comparisons
 - Cross tabulations
- Enumerations using Excel
 - Many, some, few, almost all, etc
 - One, many times vs.. many, one-time

Cautions



- Resist the urge to count
- Use Excel to accommodate the data instead of trying to make the data fit Excel
- Let study purpose and conceptual framework drive your coding decisions
- Remember--all the real work takes place in your brain not the computer's

Encouragement



- You don't need to be an Excel expert
- Find your own format
- Explore more functions
- Share it with a colleague
- Share what else you learn
- Have fun!



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Contact



Susan Eliot, MSPH

Eliot & Associates

503-287-0693

susan@qualitative-researcher.com

www.Qualitative-Researcher.com