



## Using Qualitative Case Studies in Research on Foreign Language Teaching and Learning

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### Introduction

In this article, I critically discuss qualitative case studies as a research method. The discussion will include what defines a case study, what kinds of data collection and analysis can be employed and what ethical and validity issues should be considered when conducting research in this tradition. I would like particularly to concentrate on how the case study has been used in foreign language teaching and learning research to give practical guidelines on how we can apply this method into our research. To do this, I shall discuss some exemplary studies which have been conducted previously.

The case study as a research method is arguably a contested domain (Yazan, 2015) because it has many definitions which stem from different perspectives held by the people who define it. Arriving at one single definition can, therefore, be seen as simply unnecessary (Cohen et al., 2018). These differences concern, among other things, the ways in which researchers define a case. Merriam (1998) believes that a “qualitative case study can be defined in terms of the process of actually carrying out the investigation, the unit of analysis (the bounded system, the case) or the end product” (p. 34).

At the heart of case study research is the case itself. It may constitute one single case such as a person, a family or a social group or multiple cases ranging from two to ten different cases depending on the topic under investigation and the availability of research participants (Duff, 2014). Case study research is also known as small-N research (Duff, 2014; Tight, 2010) because it is usually employed to study a small number of participant (e.g., a learner, a teacher) on their own or in a group (e.g., a community) and their “experiences, issues, insights, developmental pathways, or performance within a particular linguistic, social, or educational context” (Duff, 2014, p. 233). As such, the case study is commonly placed in the qualitative camp because it is most often used to understand one particular case in detail and not to generalize the understanding gleaned beyond it (Dörnyei, 2007). This is also true primarily because case studies have been used extensively to study the sociocultural aspects of contemporary phenomena such as multilingualism in transnational contexts, learners in immigration contexts, language loss, and migrant biliteracy which are approached from interpretivists rather than positivist standpoints (Duff, 2014) which see reality as having multiple meanings and several possible interpretations. The primary investigation of such phenomena usually concerns conflicting language ideologies and identity formation (see De Costa, 2010; Han, 2009; 2012; King, 2013; Ricento, 2013; Song, 2012) in which qualitative data analysis would best address research purposes. However, several other case studies have also used quantitative data analysis including the mixed-method approach (Duff et al., 2013; Larsen-freeman, 2006) in order to fully develop the understanding of the research subject. The methodological differences, in fact, also become a

source of debate. Verschuren (2003) has noted that any method can serve case studies as long as it helps to advance our understanding. The focus of this article, however, is on the qualitative case study, namely a study of a small sample which investigates the sociocultural aspects of individuals' experiences in terms of language learning, language use or language teaching in a context and ways that are regarded as theoretically and descriptively intriguing (Duff, 2014). This decision is supported by the fact that case studies are more often used qualitatively.

Researchers have debated what the case study is, but they also share some assumptions about this method of inquiry. Firstly, researchers tend to agree that the main underlying reason why we do case studies is the intriguing nature of a case and our "interest in an individual case" (Stake, 2005, p. 443; Duff, 2014). This point of interest can come from either the unique nature of the case itself (Stake, 1995, 2005) or the researcher's curiosity. For instance, we might be interested in investigating unusual experiences of language learners with immigrant backgrounds or a school which implements English medium instruction (EMI). Secondly, several researchers also agree that case studies are often carried out in-depth. For instance, Gall et al. (2003) defines the case study as the in-depth analysis of instances of a phenomenon. Similarly, Creswell (1998) sees the case study as an in-depth examination of a bounded system or a case (or multiple cases). The same goes for Merriam's (1998) definition which describes case studies as the "holistic description and analysis of a single entity" (p. 16). These definitions share several assumptions about the unique nature of case investigation in which the focus may be on one or more case, investigation is undertaken on one bounded system and the subject is studied in-depth.

As it is committed to in-depth analysis, the case study is defined by some other scholars in terms of the process of carrying out the investigation. For example, Sturman, (1999) uses the ethnographic case study which usually requires an extended period of time to yield "fine-grained" details of the case being studied (Cohen et al., 2018, p. 376). Hamilton and Corbett-Whittier (2013) also propose the longitudinal case study because it is used to capture the dynamics and changes of the subject under investigation over a certain period. As a result, other researchers argue that the case study is partially longitudinal in nature in the sense that it requires time commitment (Dörnyei, 2007). Furthermore, case study researchers would usually employ multiple data collection techniques such as interviews, documents, and observations because they want to provide a thorough understanding of a particular phenomenon. In fact, the use of multiple data sources is the main characteristic which distinguishes case studies from other methods (Casanave, 2015). In terms of the unit of analysis, a case study may use one or more cases (e.g., two or three English classes in the same school). The school in this case serves both as the context in which the cases are nested, and the main case itself which forms that bounded system. After the unit of analysis becomes clear, it is important to situate the case in its research context: "What is this a case of?" (Thomas, 2011, p. 515). This can be done by linking the case to a certain social phenomenon such as learning another language, identity formation or engaging in intercultural communication (Duff, 2014). This is important because qualitative research aims to investigate an observable phenomenon in its natural context in which "the case is an exemplar" (Duff, 2014, p. 237). The contexts relevant to research in our field can be classrooms, language testing sessions or job interviews (Duff, 2008) and these particular contexts are part of a wider social phenomenon.

Case studies can also be defined in terms of the end product that they generate. They can be exploratory in which they will generate a hypothesis; they can also be descriptive aiming to provide a narrative account of the participant being researched. Case studies can also be explanatory, focusing on testing a theory (Yin, 2009). In the case of descriptive case studies, for instance, the findings from such studies usually provide a thorough and thick description about someone's life histories and experiences in the form of narrative inquiry. Fuentes (2012) study describes the language learning experiences of a student named Nasim and reveals how his experiences have shaped and re-shaped his education. The descriptive case study can then contribute to "shed empirical light about some theoretical concepts" (Yin, 2014, p. 40) which may offer theoretical generalization as opposed to statistical generalization in the form of the "lesson learned" (p. 40). Therefore, the approach we use to undertake a case study may influence the end product or the result generated from that study.

To sum up, the case study is driven by a commitment to understand and analyze the unique characteristics of a given case. This commitment leads to the need to employ more than one data collection technique. It further influences the case selection in which the researcher can opt to investigate one or more cases as long as they are within one bounded system or one natural context as a part of wider social phenomena. As Duff (2008) sums it up, the definition of the case study most often includes “the bounded, singular nature of the case, the importance of context, the availability of multiple sources of information..., and the in-depth nature of analysis” (p. 22). She elaborates that the individual case:

is usually selected for study on the basis of specific psychological, biological, sociocultural, institutional, or linguistic attributes, representing a particular age group, a combination of first and second languages, an ability level (e.g., basic or advanced), a skill area such as writing, a linguistics domain such as morphology and syntax, or a mode or medium of learning such as an online computer-mediated environment ... (pp. 32-33)

The focus of the qualitative case study in foreign language teaching and learning research has been on examining certain phenomena in a given natural context such as a classroom, particular social contexts in which an individual language learner lives and socializes or community-workplace based activity (Duff, 2008). We will discuss several qualitative case studies in this field next.

## **Qualitative Case Studies in Foreign Language Teaching Research**

### **Case Selection and Sampling**

The selection of cases, as suggested by Duff (2008), is largely dependent upon “how much is already known about a topic, the amount of previous empirical research, ... the nature of the case itself and the philosophy of the researcher” (p. 31). The researcher’s knowledge, therefore, plays a crucial role in the case selection and a certain amount of depth and breadth of knowledge about what has been going on in a certain field may be required. This is because we have to situate our research into a particular body of literature. In applied linguistics or language teaching and learning research, for example, we may be interested in conducting research around multilingual pedagogy, English teacher education, and the debate about native versus non-native English speaker-teachers (see Abiria et al., 2013; Burri, 2017; Supasiraprapa & De Costa, 2016).

Another important issue is sampling. One method we can use to take samples for our research is purposive sampling in which the sample (the case) is chosen deliberately based on the presence of certain criteria (Casanave, 2015). For example, if we want to investigate the language learning experience of an immigrant student who has successfully learned English as his/her third language, we might need to set a minimum length of stay for our participant to ensure that they have settled in and had enough experience of living in a new place. This sampling technique is usually paired with convenience sampling in which the researcher can choose participants with whom they are familiar and to whom they have access (Given, 2008).

In her study of the writing practices of a biliterate migrant student, Yi (2007) purposefully chooses Joan, her research participant, based on certain criteria such as the participant’s biliteracy in English and heritage language, writing productivity, and status as a migrant. Similarly, Cornell et al. (2016) use one criterion to choose their participants in which they invite only top-scoring students in a vocabulary exercise. At the same time, they also employ convenience sampling because the participants are all students in a university where one of the researchers works. Another sampling technique often combined with the approaches described above is snowball sampling (Noy, 2008). These two studies have further provided examples on how we identify a case. Participants in Cornell’s et al. study (2016) are students who study English as their second language. The researchers find that their participants are very good at

vocabulary mastery and this becomes the driving force for them to investigate further the participants' experiences. They manage to document how participants' use of vocabulary learning strategies outside of the classroom influence their vocabulary skills. The results shed light on how ESL learners acquire new vocabulary.

## Data Collection

Qualitative case study gathers data from multiple sources which need to come together in a triangulating manner (Yin, 2003a). The most common way of collecting data in qualitative research is by interview. A qualitative interview is commonly less structured and more flexible, and the researcher can explore beyond the guideline questions as a result of noteworthy issues that emerge during the interview process (Bryman, 2008). A qualitative interview employs unstructured and semi-structured types of questions; an unstructured interview looks like casual conversation which is smoothly flowing but is usually guided by one single topic or question, whereas a semi-structured interview covers a number of questions schedule on specific topic (Bryman, 2008). The most pivotal issue in an interview is, therefore, having a certain degree of structure but also opening up room to explore beyond the guidelines (Leidner, 1993). These two types of interviews have been commonly referred to as in-depth interviews or qualitative interviews in general terms (Bryman, 2008). In-depth interviewing starts with a researcher's initial perception and understanding of lived cultural experience. It then moves further to investigate the contextual periphery of that experience and perception, to reveal hidden meaning and finally to generate a more reflective understanding about the true nature of that experience (Johnson & Rowlands, 2012). Overall, a qualitative interview looks for rich and detail answers and thus is usually conducted several times during a certain period (Bryman, 2008).

Another possible data collection technique is observation. It is a systematic process of looking and noting details of people, events, routines, settings and behaviors (Marshall & Rossman, 2016). It provides researchers with rich contextual information and the opportunity to understand routines and aspects of life in verbal, non-verbal and physical forms (Clark et al., 2009). This type of data collection method is chosen because of its ability to record interactions in social contexts systematically. It allows researchers opportunities to triangulate and complement other kinds of data (Simpson & Tuson, 2003). Semi-structured observation will generate a hypothesis. It concentrates on capturing and understanding the dynamic nature of events and the complexity of the participants' world (Cohen et al., 2018). The semi-structured approach is also guided by an agenda of issues and it aims to gather data in order to clarify these issues in a less structured way (Cohen et al., 2018). That is why fieldnotes are also used to record and document the observed events. Finally, we can also use documentary data such as written policy, curricula, syllabi, sample of students' writing and so on. A document is a social construct because it reflects the meaning created by its author and reveals the worldview and cultural context of all those involved in its creation (Ball, 2013).

Yi (2007) and Cornell et al. (2016) employ these techniques in their case study. Yi (2007) conducts interviews once a week for five months (for 1 to 2 hours each session). She also triangulates her data with observation. Because she focuses on writing skill, she uses documentary data in the form of participant's writing sample such as poem, online postings, and emails. Cornell et al. (2016) conduct semi-structured interviews, observation during participants' vocabulary study and participants' vocabulary journal. Overall, these data sources come together in a triangulating fashion informing each other in the analysis process.

## Data Analysis

Qualitative data is usually "messy if not chaotic" (Dörnyei, 2007, p. 244) and data analysis becomes a challenging task for researchers. They need to be able to create insightful order from the various stories and practices which have been collected and observed. Dörnyei (2007) believes that there are two

analytical approaches. Subjective intuition is finding a creative way to build meaningful story lines from the chaotic puzzle. A formalized analytical approach, on the other hand, follows systematic step by step process to reveal the hidden stories. However, qualitative researchers tend to prefer the latter approach because its systematic nature helps the researcher avoid “being wrong” (Dörnyei, 2007, p. 245). The formalized systematic approach, Miles and Huberman (1994) argue, has a stronger warrant in which a researcher can convince readers that the data are valid and rigorously analyzed. There are several types of systematic qualitative data analysis which have been widely employed. They are qualitative content analysis (QCA) and thematic analysis (TA).

QCA and TA are systematic ways of describing qualitative data which is done by putting certain data into categories of coding frame (Schreier, 2012; Terry et al., 2017). Both methods concentrate on generating themes (Dapkus, 1985; Schreier, 2012). Qualitative content analysis is not initially determined but is inductively derived (Dörnyei, 2007). The key feature of qualitative content analysis is that it concerns second-level interpretation to seek the deeper meanings of the data (Dörnyei, 2007). Meanwhile, TA is quite different from QCA because it has two types of codes (semantic & latent code). TA begins with the researcher creating a semantic code built around what participants say and mirror their meaning. A ‘latent code’ goes beyond participant meaning in that it brings researchers’ own agendas (e.g., critical agenda) to bear as a framework.

Furthermore, TA is theoretically flexible and can be conducted within various frameworks such as critical theory (Terry et al., 2017). It allows the researcher to be reflexive in deciding which researcher backgrounds, research questions and research agendas affect the ways in which codes and themes are identified (Terry et al., 2017).

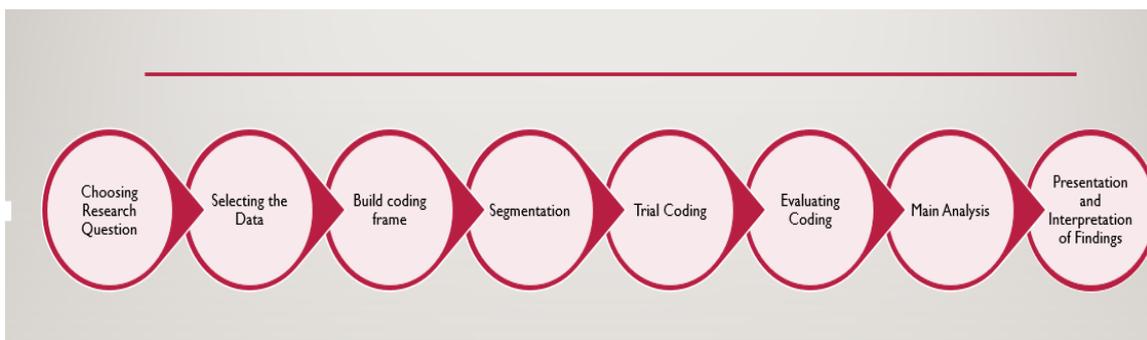


Figure 1. Stages in QCA (Shreier, 2013).

Yi (2007) explains the processes she has taken to analyze the data in detail. She first engages in “memoing” in which she reads and re-reads the data and make notes. In fact, data display is another pivotal part in data analysis. Data display can be done through memos, vignettes and interview profiles and it helps researchers produce structured reflection (Dörnyei, 2007). Coding and categorization are performed in order to gather different bits of data from similar phenomena. Codes are then summarized to generate the most significant themes. Finally, she identifies main patterns and regularities by considering major similarities and differences and by connecting different parts of data to eventually tell the story to readers. Apart from triangulation which is one of the main strengths of case studies, explaining and reporting in detail every decision that we take will enhance not only the validity of our findings but also our credibility as a researcher.

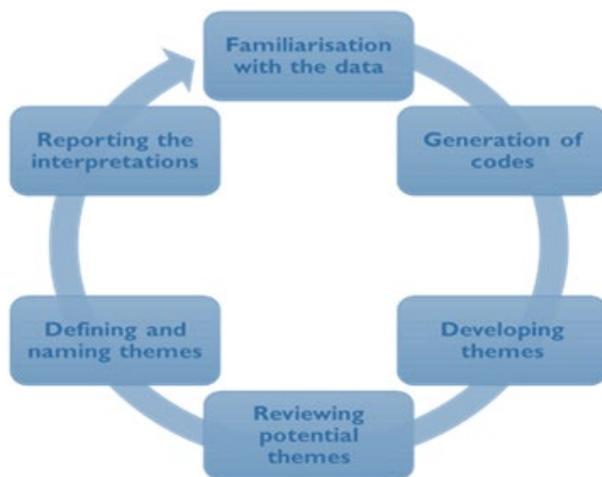


Figure 2. Stages in TA.

The processes in TA are arguably quite similar. TA starts with researchers familiarizing themselves with the data. The researchers will then generate codes and codes which belong to the same category will be grouped together to develop themes. These themes should then be reviewed to ensure accuracy. The final stage is reporting the result of researchers' interpretation. However, most often than not researchers do not specifically mention which data analysis method they use and that is why TA is said to be improperly acknowledged (Terry et al., 2017). NVivo as a coding tool has been widely used by qualitative researchers because it eases their burden in data analysis.

### Achieving Qualitative Rigor

The simplest underlying assumption for trustworthiness in qualitative research is how researchers can persuasively convince their readers that the findings are worth considering and taking account of (Lincoln & Guba, 1985). Some researchers have proposed different evaluation criteria (see Lincoln & Guba, 1985; Richardson, 2000; Stewart, 1998). However, it is important to note that certain criteria, Lazaraton (2003) argues cannot be generalized to all forms of qualitative inquiry (e.g., CA). In this article, I will explain evaluation criteria proposed by Lincoln and Guba (1985) which I believe to be the most relevant to evaluate case study research and which have been previously employed by renowned case study researchers (Duff, 2014; Yi, 2007, 2013).

A quantitative approach would use numerical measures to reach validity and reliability of data but this does not happen in the qualitative approach. Quantitative researchers have often questioned the criteria for rigor in qualitative research (Hammersley, 2007). In response to this critique, Guba and Lincoln (1985) propose several criteria of trustworthiness which are still extensively used today. Those criteria are credibility, transferability, and confirmability. Other qualitative proponents argue that strategies to ensure validity and verification in qualitative research are included within the whole design and cohesively embedded in the method used (Morse, 2018). In short, criteria of trustworthiness are an effort to achieve rigor (Morse, 2018). Credibility is the first criterion. The most common strategies for credibility include prolonged engagement. This allows researchers to fully understand the context they have studied (investing sufficient amount of time in the site), to minimize distortions and to build trust (Lincoln & Guba, 1985). Yi (2007) ensures credibility in his findings by conducting data collection for about five months. The same goes to Cornell et al.'s (2016) study which is run for about one semester, the duration of a course in a university where their research was carried out. However, there is no exact standard of duration because it so much depends on the context's scope, but at least the duration has to be long enough to achieve a holistic understanding of the object being studied (Lincoln & Guba, 1985).

Secondly, credibility can also be reached by doing contextual validation, theoretical, methodological and analytical triangulation, among other things. To do this, for example, a researcher could compare their evidence with other similar evidence (Lincoln & Guba, 1985). Another strategy is by having referential adequacy in which researchers collect videotape, photographs, or audio recordings which are contextually rich and are able to provide holistic background information to support data analysis (Byrne, 2001). Peer debriefers (using external parties to validate and critique) and member checks (confirming researchers' interpretation and conclusions with informants) are also common strategies to ensure credibility. In fact, member checks are the most common strategy used by researchers. Yi (2007) for example continuously checks her analysis and interpretation with Joan in which Joan may adjust and elaborate if misunderstanding occurs.

The third criterion is transferability. Dörnyei's (2007) says that a qualitative case study is not heavily concerned with generalizability because the researcher believes that a particular individual case and the meaning it carries are enlightening. Even though it does not offer generalization to population due to its small size, a qualitative case study, if conducted well, may have the ability to offer analytic generalization (Dörnyei, 2007) in the form of the formulation of theoretical principles and models which offer relevance. This is referred to as transferability (evaluating the extent to which findings can be applied to different contexts) (Byrne, 2001). To achieve this, researchers have to provide holistic and thick descriptions of the findings and also do purposive sampling which has been outlined earlier. Lastly, confirmability deals with an auditing trail. The idea is to allow independent examiners to track the decisions and steps taken in the study (Byrne, 2001).

## **The Strengths and Limitations**

Defining the strength and limitation of case study is a difficult task because what seems to be the strength may as well be the source of weaknesses or limitation. Most qualitative researchers agree that the most striking strength of the case study is its ability to provide thorough description of a case. It analyzes the complexity and dynamics of social relations in a unique instance and provides vivid, rich descriptions of a case and event related to it (Hitchcock & Hughes, 1995). Case study has given substantial contribution to foreign language teaching and learning research in terms of theory development, revealing perspective, or offering improvement of the previous theory by examining linguistics or social phenomena related to learners or teachers (Duff, 2014). This contribution is related to some of the advantages of case study research including its depth of analysis, completeness and readability (Duff, 2014). Because of these characteristics, the case study usually involves various data collection approaches (Robson, 2002). This large quantity of data is a challenge and limitation for a researcher to organize because they have to be able to present, interpret and condense the data meaningfully (Miles and Huberman, 1994). The richness of data and detailed description collected from various sources may often become the most difficult task for researcher to unravel and smoothly connect bit by bit of the data.

The second advantage is its exploratory nature which opens up possibility for future research (Duff, 2014). Case study is able to reveal new perspective and is therefore able to generate theory or hypothesis (Duff, 2014). For this reason, it can often provide counter-evidence to existing theoretical assertion (Duff, 2014). The unique and atypical case as in Yi's (2007) study is another advantage of case study because this kind of cases may advance the field's knowledge very significantly (Duff, 2014) and can widen our understanding (Dörnyei, 2007).

Time constraint and other logistic resource becomes key issue, too (Duff, 2014). Because of the huge amount of data to be analyzed and interpreted, researchers are urged to avoid data picking, choosing the most striking features of the data and thus distort the full descriptive account (Nisbet & Watt, 1984). In addition, researchers may be tempted to do selective reporting, choosing evidence which will support particular conclusion; usually shaped by their bias and positionality, which in the end may result in misinterpretation of the whole case (Nisbet & Watt, 1984). A researcher is often trapped in overly stating certain details and consequently undermining others (Shaughnessy et al., 2003). Thus, the fact that case

studies commonly provide rich descriptions of cases perfectly illustrates how the major source of strength may also be the source of weakness. Cohen et al., (2018) illustrates this by saying that a case study is a strong way of portraying reality but is difficult to organize. Another potential disadvantages of case study include attrition (withdrawing participant) and ethics related issue where participant's privacy is very difficult to protect.

## **Ethical Questions**

The data required for case studies are usually generated from various techniques such as observations, interviews, written documents and field notes which are carried out in an extended period of time. Data collection, therefore, becomes a challenging task because researchers often have to have such a close relationship with participants. These multiple data sources and length of data collection usually require researchers to build close and long-term relationships with the research participants because the main aim is to understand deep meanings and perspectives involving various forms of activities (Hammesrley & Traianou, 2012). Thus, ethical issues become a pivotal aspect in this method of inquiry. The most common ethical considerations are participants' autonomy, privacy and data protection. Firstly, it is of great importance for researchers to respect participants' freedom. To do this, researchers are required to obtain informed consent from participants before the research is carried out (Hammesrley & Traianou, 2012). After that, it is within participants' full control to withdraw from the process at any point (Hammesrley & Traianou, 2012). Because interviews become fundamental in qualitative research, researchers must also clearly communicate access to collect data in order to create mutually beneficial and harmless interactions (Orb et al., 2000). If the interview is conducted on several occasions, a researcher is also urged to plan the schedule carefully so that it accommodates both persons' interests. Certain types of data collection such as photographs and video recordings require separate consent and researchers should be particularly careful because these data recording techniques may not be appropriate in certain cultures (Hammesrley & Traianou, 2012).

There is an obligation for researchers to publish their research findings and make them publicly accessible. Therefore, issues regarding confidentiality and participants' privacy becomes one of the most crucial parts of this research (Hammesrley & Traianou, 2012). For the purpose of protecting participants' privacy and anonymity, the use of pseudonyms is an obligation (Orb et al., 2000). The participant also has the right to know how the result will be published. Another important aspect to ethics is justice. The distinctive feature of this aspect is avoiding exploitation and abuse particularly if the research involves vulnerable actor such as children and the elderly (Orb et al., 2000). The researcher has a moral obligation to recognize participants' contributions to the research. For instance, if in certain parts a researcher uses data from particular participants, ethically, the researcher should ask permission of the participant so that their contribution is properly acknowledged (Orb et al., 2000).

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