Drawing from a long tradition in anthropology and sociology, qualitative research has achieved a status and visibility in the social sciences and applied fields of practice equal to quantitative designs such as surveys and experiments. Reports of qualitative research studies can be found in journals in social work, nursing, counseling, family relations, administration, health, community services, management, all subfields of education, and even medicine. Some disciplines have their own qualitative research journal, as do education (International Journal of Qualitative Studies in Education), social work (Qualitative Social Work), health (Qualitative Health Research), and management (Qualitative Research in Organizations and Management: An International Journal). In addition, there are journals devoted to qualitative research itself such as Qualitative Inquiry, International Journal of Qualitative Methods, The Qualitative Report, and Qualitative Research. There is also an endless selection of methodological texts on qualitative research generally, specific types of qualitative research, or some aspect of qualitative data collection or analysis.

What is the nature of qualitative inquiry that has captured the attention of so many? The purpose of this chapter is to explain what qualitative research is, how it differs from positivist or quantitative research, what variations exist within the qualitative paradigm, and how one goes about conducting a qualitative study. This chapter and the following chapter on evaluating and assessing qualitative research offer the backdrop for exploring the collection of qualitative studies and author commentaries that follows.

**The Nature of Qualitative Research**

The key to understanding qualitative research lies with the idea that meaning is socially constructed by individuals interacting with their world. The world, or reality, is not the fixed, single, agreed upon, or measurable phenomenon that it is assumed to be in positivist, quantitative research. For example, a qualitative researcher might be interested in identifying reasons adults drop out of a...
community-based adult literacy program before achieving their goals. Any number of factors might emerge in interviews with participants, including some that hadn’t been identified in previous studies or that hadn’t occurred to the researcher. This qualitative approach contrasts with a quantitative approach wherein the researcher identifies the factors ahead of time and then seeks to measure the prevalence and strength of each factor. Qualitative researchers are interested in knowing how people understand and experience their world at a particular point in time and in a particular context. Exploring how individuals experience and interact with their social world, and the meaning it has for them, is based on an interpretive (or constructivist) perspective embedded in qualitative approach.

There are two other philosophical perspectives that largely inform the design of qualitative research. Drawing from critical social theory, you might investigate how the social and political aspects of the context shape how people see or understand the situation; that is, how larger contextual factors affect the ways in which individuals construct reality. This would be a critical qualitative approach. Using the same example of dropouts from an adult literacy program from a critical qualitative perspective, you would be interested in how the literacy program is structured such that the interests of some members and classes of society are served and perpetuated at the expense of others. Perhaps the program is offered at a location that is difficult to get to via public transportation, or at hours incompatible with parents’ childcare responsibilities, or the program is offered at a site that low-literate adults find intimidating such as a college campus. Whose interests does this program serve? How do power, privilege, and oppression play out?

Critical social science research has its own variations. Much of feminist research draws from critical theory, as does participatory or participatory action research, a form of research that involves participants in the design and implementation of a study. Some critical research incorporates a strong emancipatory agenda along with critique; that is, in the process of conducting the investigation the overall objective is to empower participants to not only question, but also to change their situation. Cranton (2015) summarizes this perspective as follows:

> Emancipatory knowledge is gained through a process of critically questioning ourselves and the social systems within which we live. . . . If we do not question current scientific and social theories and accepted truths, we may never realize how we are constrained by their inevitable distortions and errors. (p. 315)

The third, and somewhat less common than an interpretive/constructivist or critical perspective in designing a qualitative study, is a philosophy called postmodern. Here researchers question all aspects of the construction of reality, what it is and what it is not, how it is organized, and so on. “Postmodern researchers view reality and knowledge as fragmented, multiple situated, and multi-faced. On these premises, reality is thought to be nearly impossible to know or represent” (Tracy, 2013, p. 44). Tracy goes on to write that “in stark contrast to positivists, who view good research as mirroring reality, postmodernists would note that mirrors
are warped, fractured, and reflect back onto the scene (and therefore affect it). . . .
The best a postmodern researcher can do, then, is to choose a shard of a shattered
mirror and realize that it only reflects one sliver of the world” (p. 45). A post-
modern inquiry would question and “disrupt” the dichotomies inherent in the
literacy program above; for example, the dichotomies of “completers versus non-
completers,” or “successful versus unsuccessful,” or “graduates versus dropouts”
might be challenged. Lather (2006) lays out these three overarching theoretical
perspectives in terms of understanding (interpretive), emancipation (critical and
feminist are included here), and deconstruction (postmodern).

As a qualitative researcher, you can approach an investigation from any
of these perspectives. Your particular perspective will determine the specific
research design that you employ for actually carrying out your study. If your
primary interest is in understanding a phenomenon, you have many design
options, the most common being interpretive, phenomenology, ethnography,
grounded theory, and narrative. Critical, feminist, postmodern, and participa-
tory studies all have goals that include understanding, but go further in the pur-
pose or inquiry.

Several key characteristics cut across the various qualitative research designs
(also called forms, types, methodologies, or genres by various authors). The first
characteristic is that researchers strive to understand the meaning people have con-
structed about their world and their experiences; that is, how do people make sense
of their experience? As Patton (2015) explains: “What makes us different from
other animals is our capacity to assign meaning to things. The essence of being
human is integrating and making sense of experience (Loevinger, 1976). Qual-
itative research inquires into, documents, and interprets the meaning-making
process” (p. 3). As qualitative researchers, we want to understand how people
make sense of their lives and how they understand the world around them. We
find out how people make meaning of their experiences by asking them in inter-
views, and/or observing the phenomenon of interest, and/or analyzing relevant
documents/artifacts.

A second characteristic of all forms of qualitative research designs is that the
researcher is the primary instrument for data collection and data analysis. In contrast
to a survey or an experiment, the human instrument can immediately respond
and adapt. Questions that don’t “work” in an interview can be changed, as can
sites for observations and fieldwork. Other advantages are that the researchers
can expand their understanding through nonverbal as well as verbal communi-
cation, process information (data) immediately, clarify and summarize material,
check with respondents for accuracy of interpretation, and explore unusual or
unanticipated responses. Further, because the human instrument can simultane-
ously analyze data as the data are being collected, adjustments in data collection
can be made that may yield a more robust analysis and understanding of the
phenomenon.

When the researcher is the primary instrument for data collection and anal-
ysis, it is wise to be aware of one’s shortcomings and biases that might impact
the study. Rather than trying to eliminate these biases or “subjectivities,” it is
important to identify them and monitor them as to how they may be shaping the collection and interpretation of data. Peshkin (1988) goes so far as to make the case that one’s subjectivities “can be seen as virtuous, for it is the basis of researchers making a distinctive contribution, one that results from the unique configuration of their personal qualities joined to the data they have collected” (p. 18).

Qualitative researchers are interested in how people understand and make meaning of their world. Often there is no convincing explanation, or an existing theory fails to adequately illuminate the phenomenon of interest. Therefore, another important characteristic of qualitative research is that the process is inductive; rather than deductively deriving hypotheses to be tested (as in positivist research), researchers gather data to build concepts, hypotheses, or theory. In attempting to understand the meaning a phenomenon has for those involved, qualitative researchers build toward theory from observations and intuitive understandings gleaned from being in the field. Typically, findings inductively derived from the data in a qualitative study are in the form of themes, categories, typologies, concepts, tentative hypotheses, or even a substantive theory, that is, one that addresses a specific real-world situation.

Finally, because qualitative research is designed to understand a phenomenon from the participants’ perspectives, the product of a qualitative inquiry is richly descriptive. Rather than relying on numbers, words and sometimes pictures are used to convey what the researcher has learned about the topic of the study. In order to convey this understanding, the write-up of a qualitative study usually includes descriptions of the context, the participants involved, and the activities of interest. The “findings” of a qualitative study are supported by quotations from participant interviews, selections from documents or the researcher’s field notes, descriptions of artifacts, excerpts from videotapes, photos, and so on. A reader can think of these data as “evidence” for the findings of the study.

In summary, qualitative research attempts to understand and make sense of phenomena from the participant’s viewpoint. The researcher can approach the phenomena from an interpretive, critical, or postmodern perspective. All qualitative research is characterized by the search for meaning and understanding, the researcher as the primary instrument of data collection and analysis, an inductive investigative strategy, and a richly descriptive end product.

**Distinguishing Among Types of Qualitative Research Design**

From education to anthropology to management science, researchers, students, and practitioners are conducting qualitative studies. It is not surprising, then, that different disciplines and fields ask different questions and have evolved somewhat different strategies and procedures. Writers of qualitative texts have organized the diversity of forms of qualitative research in various ways. Patton (2015), for example, presents sixteen orientations to qualitative research according to the different kinds of questions researchers from different disciplines might ask.
Creswell (2013) has identified five “traditions” – narrative research, phenomenology, grounded theory, ethnography, and case study. Denzin and Lincoln (2011) identify several “strategies of inquiry” including case study, ethnography, mixed methods, grounded theory, and participatory action research. They write that qualitative research, while used in “many separate disciplines, . . . does not belong to a single discipline. Nor does qualitative research have a distinct set of methods that are entirely its own.” Rather, it is “a set of complex interpretive practices” (p. 6).

Given the variety of qualitative research approaches, we have chosen to organize this resource book around eight designs that center on or include a substantial component of qualitative methods. Of the eight, five are exclusively qualitative in the design and conduct of the study: interpretive, phenomenology, ethnography, grounded theory, and narrative inquiry. Three more recent designs incorporate a significant component of qualitative data – arts-based research, qualitative action research, and mixed methods. These and other types of qualitative research do have some attributes in common that result in their falling under the umbrella concept of “qualitative.” However, they each have a somewhat different focus, resulting in variations in how the research question might be asked, how the sample is selected, how data are collected and analyzed, and how findings are presented. The following is a short description of each of the eight designs. More thorough discussions of each, along with examples and author commentaries, can be found in Part Two.

**Interpretive**

An interpretive and descriptive qualitative study exemplifies all the characteristics of qualitative research discussed above; that is, the researcher is first and foremost interested in understanding how participants make meaning of a situation or phenomenon. This meaning is mediated through the researcher as instrument, data analysis is inductive, and the outcome is descriptive. In conducting an interpretive qualitative study, you seek to discover and understand a phenomenon, a process, the perspectives and worldviews of the people involved, or a combination of these. Data are collected through interviews, observations, and/or documents/artifacts. These data are inductively analyzed to identify the recurring patterns or common themes that cut across the data. A rich, descriptive account of the findings is presented and discussed, using references to the literature that framed the study in the first place. Exactly what questions are asked will depend upon one’s discipline and the literature one is using to frame the study. For example, in Roulston, Jutras, and Kim’s (2015) study of adults’ perceptions and experiences of learning musical instruments, the researchers interviewed 15 adults in the southeastern United States who were learning to play instruments to understand the participants’ prior experiences in music, their motivations for learning to play instruments, and their learning goals, learning strategies they employ, the benefits that they attribute to their engagement in musical activities, and the challenges faced.
Often researchers are hesitant to use what some label a generic or basic design and feel they must name or categorize the type of qualitative research they are conducting using terms such as “case study,” “grounded theory,” or “phenomenology” when in fact they are employing a well-used design: interpretive. The majority of qualitative research studies in education and other fields of practice fall under this design and are labeled simply as “a qualitative study.”

**Phenomenology**

Because phenomenology as a school of philosophical thought underpins all qualitative research, some assume that all qualitative research is phenomenological, and certainly in one sense it is. However, even though the phenomenological notions of experience and understanding run through all qualitative research, one could also engage in a phenomenological study using its own “tools” or inquiry techniques that differentiate it from other qualitative designs.

In the same way that ethnography focuses on culture, a phenomenological study focuses on the essence or structure of an experience. Phenomenologists are interested in showing how complex meanings are built out of simple units of direct experience. This form of inquiry is an attempt to deal with inner experiences unexamined in everyday life. According to Patton (2015), this type of qualitative research design is based on

> the assumption that there is an essence or essences to shared experience. . . . The experiences of different people are bracketed, analyzed, and compared to identify the essences of the phenomenon, for example, the essence of loneliness, the essence of being a mother, or the essence of being a participant in a particular program. (p. 116, emphasis in original)

In order to understand the essence or structure of an experience, the researcher temporarily puts aside, or “brackets,” personal attitudes or beliefs about the phenomenon. With belief temporarily suspended, consciousness itself becomes heightened, allowing the researcher to intuit or see the essence of the phenomenon. Topics well suited to a phenomenological approach often have to do with emotions and inner feelings such as a study of children’s spirituality (Natsis, 2017), career anxiety among college students (Pisarik, Rowell, & Thompson, 2017), or Ruth-Sahd and Tisdell’s (2007) exploration of how intuitive knowing influences the practice of novice nurses.

**Ethnography**

This form of qualitative research design has a long tradition in the field of anthropology. It was developed by anthropologists specifically to study human society and culture. Although culture has been variously defined, it usually refers to the beliefs, values, and attitudes that shape the behavior of a particular group of people. D’Andrade (1992) writes that culture is something behaviorally and
cognitively shared by an identifiable group of people and that it has “the potential of being passed on to new group members, to exist with some permanency through time and across space” (p. 230).

Confusion results when the term “ethnography” is used interchangeably with fieldwork, participant observation, case study, and so on. For a qualitative study to be termed “ethnography,” it must present a sociocultural interpretation of the data. Therefore, ethnography is not defined by how data are collected, although doing an ethnographic study almost always includes spending time on site with a particular sociocultural group, but rather by the lens through which the data are interpreted. An ethnographic study “re-creates for the reader the shared beliefs, practices, artifacts, folk knowledge, and behaviors of some group of people” (LeCompte & Preissle, 1993, pp. 2–3). Most people are familiar with ethnographies of foreign and exotic cultures, such as Margaret Mead’s *Coming of Age in Samoa* (1973). But as Patton (2015) points out, today ethnographic studies are also about some aspect of contemporary society such as “Information Age culture, the culture of poverty, school culture, the culture of addiction, intercultural marriages, youth culture” and so on (p. 100). There are also numerous variations of ethnographies, such as autoethnography, performance ethnography, and critical ethnography. Hammersley (2017) underscores this proliferation of terms in his discussion of the definitions and multiple variations of ethnography ranging from corporate ethnography to feminist ethnography to virtual ethnography to autoethnography and so on. However, at the heart of any type of ethnographic research is the focus on a particular group’s shared culture.

**Grounded Theory**

Glaser and Strauss’s 1967 book *The Discovery of Grounded Theory* launched, or at least was key in the development of qualitative research as a viable research paradigm. The goal of this type of qualitative study is to derive inductively from data a theory that is “grounded” in the data – hence, grounded theory. Grounded theory research emphasizes discovery, with description and verification as secondary concerns. Researchers in this mode build substantive theory, which is distinguished from grand or formal theory. Substantive theory is localized, dealing with particular real-world situations such as how adults manage school, family, and work life, what constitutes an effective counseling program for teen mothers, or how a community allocates its resources.

Data gathered for a grounded theory study are analyzed via the constant comparative method of data analysis, which involves continually comparing one unit of data with another in order to derive conceptual elements of the theory. Many researchers using other qualitative designs have adopted this method, even though they may not be developing theory. This has resulted in claims by some researchers that they are doing a grounded theory study when in fact there is no substantive theory as an outcome of the inquiry. A grounded theory consists of categories, properties, and hypotheses that state relationships among categories
and properties. Unlike hypotheses in experimental studies, grounded theory hypotheses are tentative and suggestive rather than tested.

**Narrative Inquiry**

The key to this design is the use of *stories* as data, and more specifically, first-person accounts of experience told in story form. “Stories organize and shape our experiences and also tell others about our lives, relationships, journeys, decisions, successes, and failures” (Patton, 2015, p. 128). Manning and Cullum-Swan (1994) write that narrative inquiry “typically takes the perspective of the teller, rather than that of the society” (p. 465). Context is important, however, for “if one defines narrative as a story with a beginning, middle, and end that reveals someone’s experiences, narratives take many forms, are told in many settings, before many audiences, and with various degrees of connection to actual events or persons” (p. 465).

Central to narrative inquiry is the process of analyzing people’s stories. There are several strategies one can use to do the actual analysis of narratives or people’s stories. The three most common are psychological, biographical, and discourse analysis. In the psychological approach, the story is analyzed in terms of internal thoughts and motivations. A more biographical approach attends to the person in relation to society and takes into account the influences of gender, class, race, and family beginnings (Denzin, 2014). Discourse analysis examines the written text of the story for its component parts or assesses the spoken words by looking for intonation, pitch, and pauses as lenses to the meaning of the text (Gee, 2014). For a discussion of issues involved in analyzing narratives in a longitudinal narrative study of adults living with serious illnesses, see Bruce, Beuthin, Shields, Molzahn, and Schick-Makaroff (2016). Whatever the approach to analyzing the data, the central defining feature of this type of qualitative research is that the data are in the form of a story.

**Arts-Based Research**

The various designs of qualitative research discussed above have been well defined and understood for decades if not longer (as in the case of ethnography, which originated with anthropologists). More recently, several newer approaches to qualitative research have emerged. One such approach, known as arts-based research, is capturing the attention of qualitative researchers looking for creative means of gathering data as well as presenting the findings of a qualitative study. Lawrence (2015) defines arts-based research as “research using any form of art (visual art, music, poetry, dance, etc.) in the data collection, analysis, and/or reporting of research” (p. 142). Examples of the diversity of applications of arts-based research include: digital bricolage with doctoral students to create digital representations of their professional identities (Armstrong, 2018); Alexander’s (2016) exploration of songwriting as a form of research; and an essay presented as a series of poems that fictionalize professors’ and students’ experiences and
narratives of sexual harassment in the academy through the use of the cartoon character Hello Kitty (Faulkner, Calafell, & Grimes, 2009).

Because qualitative research aims to uncover the meaning people make of their experiences and their lives in general, artistic forms of expression merely extend the researcher’s means of understanding a phenomenon. Drama, painting, literature, and so on are expressions of the human condition. As Merriam and Tisdell (2016) note:

The point of incorporating art into research is partly in recognition of the fact that people make meaning and express it in different ways. . . . As artists and many teachers know, people also often make meaning in new and even deeper ways when asked to express something through symbol, photography, visual art, music, metaphor, dance, poetry, or other forms of creative expression. (p. 65)

Moreover, a case can be made that the artistic presentation of research findings, such as through drama, dance, musical performance, or an artistic display, can reach a much larger audience than does a publication in an academic journal. Further, arts-based research can be used “for raising awareness and mobilizing for change” (Lawrence, 2015, p. 144).

**Qualitative Action Research**

Action research is conducted by those who want to address some problem or issue in their workplace or community and take action based on the findings. For example, a health practitioner might want to know what incentives patients need to take their medication as directed. They will collect and analyze the data, then implement the incentive plan and collect further data to understand the outcomes. Or a teacher might wonder whether sending students to sights in their community might more actively engage students in learning about the town’s history. The teacher might work with the students to design the study, collect and analyze data, and address the findings in their school. Action research involves participants in both designing and carrying out the study. The participants, like the patients and students in the above examples, actively help design the study, engage in data collection and analysis, and in some cases present the findings.

**Mixed Methods**

We have included mixed-methods research design in this book on qualitative research because it is a research methodology that always includes a component of qualitative inquiry along with more quantitative components. Creswell (2015) defines the growing use of mixed-methods research in the social sciences as “an approach to research . . . in which the investigator gathers both quantitative (closed-ended) and qualitative (open-ended) data, integrates the two and then draws interpretations based on the combined strengths of both sets of data to understand research problems” (p. 2).
There are at least three possible ways of structuring a mixed-method study. One can simultaneously collect both qualitative and quantitative data to address the research question. For example, in a study of how prospective students make decisions as to which colleges to apply to, a large sample might be administered a survey and at the same time a sample of students could be interviewed for more in-depth analysis. A second type of mixed-methods design is to first administer a survey instrument to a relevant (often random) sample of participants, then follow up with interviews with those who filled out the survey and/or others fitting the same profile as survey respondents. The interviews help the researcher understand responses to the survey instrument as well as provide additional insights into the phenomenon of interest. Creswell (2015) calls this an explanatory sequential design, as the qualitative data help explain the quantitative results. A third design, exploratory mixed methods (Creswell, 2015), is just the reverse of the explanatory sequential design because qualitative data are collected first. The analysis of the qualitative data is used in designing a quantitative component, usually a survey instrument. Whatever the order of collecting quantitative and qualitative data, mixed methods always includes a qualitative component that incorporates one of the other design approaches we have addressed in this chapter.

To summarize this brief overview of the different qualitative research designs, we see that the eight chosen for review vary widely in form and purpose. Not all qualitative research designs are the same; nor are terms such as “grounded theory,” “ethnography,” “narrative inquiry,” and so on interchangeable. However, because of the underlying view of reality and the focus on understanding and meaning, the qualitative research designs reviewed here have some characteristics in common that allow them to be categorized as “qualitative.”

**The Design of a Qualitative Study**

The design of a qualitative study focused on interpretation includes shaping a problem from the literature, forming a research question, selecting a sample, collecting and analyzing data, and representing the findings. An understanding of this process is important for assessing the rigor and value of individual reports of research (see Chapter Two for more discussion on evaluating and assessing qualitative research). Presented here is a brief overview of the component parts of the process of conducting a qualitative research study.

**The Research Problem, Research Question, and Sample Selection.** A research study begins with you being curious about something, and that “something” is usually related to your work, your family, your community, or yourself. It can also come from social and political issues of the day or from the literature. Often these spheres intersect. For example, perhaps you work for a social service agency that assists the homeless in becoming stabilized in their housing needs. Your work is very much about a pressing social problem. Or you might have observed how comfortable your children are with computers and you wonder how people not brought up with computers are learning to function in this technological age.
In any case, the place to “look” for a research problem is in your everyday experience – make inquiries about it, be curious as to why things are as they are or how they might be better.

To develop your initial curiosity more fully, you form a problem statement. In crafting the research problem, you move from general interest, curiosity, or doubt about a situation to a specific statement of the research problem. In effect, you have to translate your general curiosity into a problem that can be addressed through research. The structure of a problem statement moves from the general topic of interest, including key concepts, what has already been studied, and why it’s an important topic, to the specific research question that you will ask. This specific question is most often written first as a purpose statement and addresses some gap in the knowledge base on that topic and a rationale for filling the gap. Using the previous example of addressing the homeless, one purpose statement might read: “The purpose of this study is to understand the experience of being homeless,” or “The purpose of this study is to identify the process of moving from homelessness to stable housing,” or “The purpose of this study is to uncover how a social service agency both reinforces and challenges the state of homelessness of its clients.” For more on problem formation, see the explanation in Merriam and Tisdell (2016).

The problem statement and purpose provide the foundation for your research question. The type of question that you ask is key to doing a qualitative study. Marshall and Rossman (1995) suggest that qualitative research is designed to (a) understand processes, (b) describe poorly understood phenomena, (c) understand differences between stated and implemented policies or theories, and (d) discover thus far unspecified contextual variables. If you want to understand a phenomenon, uncover the meaning a situation has for those involved, or delineate a process (how things happen), then a qualitative design would be most appropriate. For example, you might ask, what are the experiences of homeless persons or, you might ask, what are the necessary steps or stages in the transition process of moving from homelessness to stable housing. Or, if your purpose seeks to find a solution to homelessness in a particular neighborhood, you might engage the participants themselves in an action research study to explore the kinds of interventions that would be most effective in changing their living situation in that neighborhood.

The next step in the design of a qualitative study is to select a sample from which you will collect data. For nearly every study there exist sites that could be visited, people who could be interviewed, and documents/artifacts that could be read and analyzed. How do you select which sites, people, and documents/artifacts to include in your study? To begin with, since you are not interested in quantitative questions like “how much” or “how often,” random sampling makes little sense. Instead, since qualitative inquiry seeks to understand the meaning of a phenomenon from the perspectives of the participants, it is important to select a sample from which the most can be learned. This is called a purposive or purposeful sample. Patton (2015) argues that it is important to select information-rich cases for study in depth, “those from which one can learn a great deal about
issues of central importance to the purpose of the research, thus the term *purposive sampling*” (p. 53, emphasis in original). To begin purposive sampling, you first determine what criteria are essential in choosing who is to be interviewed or what sites are to be observed. In the study of the experience of homelessness, for example, you would want to consider whether men and women would be included, what age range would be important, the length of homelessness, and so on.

**Data Collection and Analysis.** There are three major sources of data for a qualitative research study – interviews, observations, and documents/artifacts. The data collection strategy used is determined by the question of the study and by determining which source(s) of data will yield the best information to answer the question. Often there is a primary method of collecting data with support from another. Sometimes only one method is used. For example, in studying how a social service agency both reinforces and challenges the status quo of the homeless, you might interview both homeless people and staff of the agency, conduct observations of the daily operation of the agency, and study internal and external agency documents. However, if you were most interested in the experience of homelessness, interviews with those who are or have been homeless would yield the most relevant information. If possible, researchers are encouraged to use more than one method of data collection (triangulation), as multiple methods enhance the validity of the findings.

Interviews can be conducted face to face, over the phone, through the Web (such as Skype), in email, or online messaging. Moreover, interviews can be one-on-one, in small groups, or through focus groups and range from highly structured, where specific questions and the order in which they are asked are determined ahead of time, to unstructured, where one has topic areas to explore, but neither the questions nor the order are predetermined. Most interviews fall somewhere in between. These semi-structured interviews contain a mix of more and less structured questions and usually begin with specific information desired from all the participants; this forms the highly structured section of the interview. The largest part of the interview is guided by the encounter with the participants and is based on a list of questions or issues to be explored; neither the exact wording nor the order of these questions is determined ahead of time.

Observational data represent a firsthand encounter with the phenomenon of interest rather than a secondhand account obtained in an interview or document. This encounter can happen “live” or in a virtual context with a researcher “observing” online or from recorded interactions. Like the variation in interviewing, observing can range from being a complete observer to being an active participant. A complete observer is unknown to those being observed, such as from behind a one-way mirror or in an open, public place. A very active participant observer might be a member of the group or organization and is participating in the group while observing. When observation is used in conjunction with interviewing, the term fieldwork or field study is sometimes used. Observation is the best technique when an activity, event, or situation can be observed firsthand, when a fresh perspective is desired, or when participants are not able or willing to discuss the phenomenon under study.
Documents and artifacts are written, oral, visual (such as photographs), or cultural data. Examples include public records, personal documents, and physical material as well as web pages, and papers, illustrations, and games available online. The strength of these data lies with the fact that they already exist in the situation; they do not intrude upon or alter the setting in ways that the presence of the researcher might. Nor are they dependent upon the whims of human beings whose cooperation is essential for collecting data through interviews and observations. Entire studies can be built around documents or artifacts. For example, in Elliott and Stead’s (2017) study of women’s leadership during the global financial crisis of 2008–2012, newspapers were their sole source of data. In order to capture the media’s representation of women’s leadership during that time, the data were the business pages of three UK newspapers, *The Guardian*, *The Times*, and the *Daily Mail*, published from January 2009 through October 2012.

In contrast to documents or artifacts already present in the research, some may be prepared at the request of the researcher after the study has begun. Participants might be asked to keep a diary or a log of their activities relevant to the phenomenon being studied, take pictures, write a life history, and so on. Whether preexisting or researcher-generated, documents and artifacts often contain insights and clues about the phenomenon, and most researchers find them well worth the effort to locate and examine.

In qualitative research, data analysis is simultaneous with data collection. That is, one begins analyzing data with the first interview, the first observation, the first document/artifact accessed in the study. Simultaneous data collection and analysis allows the researcher to adjust along the way, even to the point of redirecting data collection, and to “test” emerging concepts, themes, and categories against subsequent data. To wait until all data are collected is to lose the opportunity to gather more reliable and valid data; to wait until the end is also to court disaster, as many qualitative researchers have found themselves facing hundreds of pages of transcripts or field notes without a clue where to begin.

With that caveat in mind, qualitative data analysis is essentially an inductive strategy. One begins with a unit of data (any meaningful word, phrase, field note, photograph, etc.) and compares it to another unit of data, and so on, all the while looking for common patterns across the data. These patterns are given names and are refined and adjusted as the analysis proceeds. Although originally used for developing grounded theory, many qualitative researchers use the constant comparative method, whether or not they are seeking to build substantive theory, but today there are researchers employing a variety of methods of analysis from interpretive phenomenological analysis (IPA) to conversation analysis to narrative analysis. Whatever strategy one uses to analyze qualitative data, the process is inductive – moving from the particular to the general and culminating in findings. “Findings” in a qualitative research study are the answers to the research question(s) that drove the study.

**Representing Qualitative Research.** There is no standard format for reporting and representing qualitative research. Rather, as can be seen from a quick glance
at the reports of qualitative research in Part Two of this book, there is a diversity of styles, some of which are quite creative. With the growth of online platforms that do not limit the presentation of data to simply text, qualitative reports can include recordings of findings represented as drama, dance, and film, or video and audio clips, and photos or scans of original data.

In more traditional write-ups of qualitative research, what needs to be considered is the audience for the report. A funding agency or the general public may want an executive summary of the findings and will probably not be interested in how the study was conducted. But colleagues and other researchers will want a detailed description of the methodology in order to assess the study’s contribution to the field.

Although the relative emphasis given each section, as well as the overall form of the report, can vary widely, all write-ups of qualitative research contain at the very minimum a discussion of the research problem, the way the investigation was conducted, and the findings, including a discussion of their importance or relevance to theory and practice. Since findings are in the form of words rather than numbers, reports vary widely regarding the ratio of supporting “raw” data included versus interpretation and analysis. The best guideline is whether enough data in the form of quotations from interviews, episodes from field observations, or document/artifact evidence are presented to support adequately and convincingly the study’s findings. In qualitative research, it is the rich, thick descriptions through words (not numbers) that persuade the reader of the trustworthiness of the findings. Nevertheless, in any report, there is tension between having the right amount of supporting data versus analysis and interpretation. Another problem is finding the right voice to present the findings. Write-ups can vary from intimate, first-person accounts to more formal presentations, to creative and artistic presentations.

**Summary**

This chapter presented an introductory overview of qualitative research. Qualitative research is an umbrella term that encompasses several philosophical or theoretical perspectives, as well as numerous designs including: interpretive, phenomenology, ethnography, grounded theory, narrative inquiry, arts-based research, qualitative action research, and mixed methods. All qualitative research designs have in common the search for meaning and understanding, the researcher as the primary instrument of data collection and analysis, an inductive analysis process, and a product that is a rich description of the phenomenon.

Also reviewed in this chapter are the phases of a qualitative research process. One must first shape a research problem and question that are appropriate for qualitative inquiry. Next, a purposeful sample is chosen, from which data are collected. The three primary sources of data are interviews, observations, and documents/artifacts. As data are being collected, data analysis is ongoing and simultaneous. There are a variety of data analysis strategies that can be employed, depending upon the type of qualitative study. Finally, it is important to present the
findings of the study in a format appropriate to the audience. It is only through the presentation and dissemination of the study’s findings that a contribution can be made to the knowledge base of a field and to practice.

References


