Chapter 9 Qualitative Research Methods

To answer some research questions, we cannot skim across the surface. We must dig deep to get a complete understanding of the phenomenon we are studying. In qualitative research, we indeed dig deep: We collect various forms of data and examine them from various angles to construct a rich and meaningful picture of a complex, multifaceted situation.

Learning Outcomes

9.1 Identify several situations in which a qualitative methodology might be especially useful.

9.2 Describe general characteristics and purposes of (a) case studies, (b) ethnographies, (c) phenomenological studies, (d) grounded theory studies, and (e) content analyses. Also, describe effective strategies you might use in each of these five research methodologies.

9.3 Identify effective strategies for collecting data in a qualitative study. As you do so, explain how you can address issues related to (a) validity and reliability, (b) sampling, (c) making observations, and (d) conducting interviews.

9.4 Describe several general criteria that are often used in evaluating qualitative studies.

The term **qualitative research** encompasses a number of methodologies that are in some respects quite different from one another. Yet all qualitative approaches have two things in common. First, they typically focus on phenomena that are occurring or have previously occurred in natural settings—that is, in the "real world." And second, they involve capturing and studying the complexity of those phenomena. Qualitative researchers rarely try to simplify what they observe. Instead, they recognize that the issue they are studying has many dimensions and layers, and they try to portray it in its multifaceted form.

Qualitative research can be found in many academic disciplines, including anthropology, sociology, psychology, biology, history, political science, education, and medicine. In fact, it could be argued that inquiry in *any* discipline begins in a qualitative form (e.g., Lauer & Asher, 1988). When little information exists on a topic, when variables are unknown, when a relevant theory base is inadequate or missing, a qualitative study can help define what is important—that is, *what needs to be studied.* For example, the field of medicine makes extensive use of qualitative methods when unique or puzzling cases are first observed. Biologists' efforts to classify newly observed species, create taxonomies, and describe the social behaviors of primates and certain other animal species are largely qualitative efforts. Many analyses of historical data are almost entirely qualitative. And social scientists often look subjectively for patterns in the complex phenomena they observe, sometimes using qualitative methods exclusively and sometimes combining qualitative and quantitative methods into a *mixed-methods design* (details to follow in Chapter 12).

In this chapter we give you a general idea of what qualitative research is and what it strives to accomplish, with a particular focus on studies of human beings and their creations. Included

in the chapter are descriptions of five kinds of qualitative studies: case studies, ethnographies, phenomenological studies, grounded theory studies, and content analyses. We describe a sixth kind, historical research, in Chapter 10.

As you proceed through the chapter, you will find several strategies—sampling, making observations, interviewing—that you previously encountered in the discussion of descriptive quantitative studies in Chapter 6. These are old news, you might think. On the contrary, such strategies can take on very different forms when we want them to yield qualitative data.

Qualitative research can be quite different from quantitative research in another important way as well. In discussions of quantitative designs and strategies in the preceding three chapters, we imply—intentionally—that data collection comes first, with data analysis to follow in a separate step. In qualitative research, however, the methodology often involves an *iterative process* in which the researcher moves back and forth between data collection and data analysis in what is sometimes called the **constant comparative method**. For example, the researcher might (a) collect some preliminary data in a natural setting; (b) inspect the data for possible patterns; (c) return to the setting to collect additional data that might substantiate, clarify, or contradict those patterns; and (d) conduct a more thorough, detailed analysis of the data—possibly repeating Steps c and d through additional iterations. Accordingly, if you are planning a qualitative study you should read both this chapter *and* the discussion of qualitative data analysis in Chapter 11 before beginning data collection.

RESEARCH PROBLEMS AND METHODOLOGY CHOICE IN QUALITATIVE RESEARCH

In Chapter 2 we emphasized the importance of pinning down the research problem with utmost precision. We sometimes find an exception in qualitative research. Some qualitative researchers often formulate only general research problems and ask only general questions about the phenomenon they are studying. For example, they might ask, "What is the nature of the culture of people living in Samoa?" or "What is it like to live with someone who has Alzheimer's disease?" Such research problems and questions don't remain so loosely defined, however. As a study proceeds, the qualitative researcher gains increasing understanding of the phenomenon under investigation and thus becomes increasingly able to ask more specific questions—and occasionally can begin to formulate and test specific hypotheses as well.

When qualitative researchers ask only open-ended research questions at the beginning of an investigation, they may have trouble identifying—at the outset—the exact methods they will use. Initially, they may select only a general approach suitable for their purpose, perhaps choosing a case study, ethnography, or content analysis. As they learn more about what they are studying and can therefore ask more specific questions, so, too, can they better specify what strategies they will use to answer those questions.

In some instances, then, the methodology of a qualitative study may continue to evolve over the course of the investigation. Despite this fact, we must emphasize that *qualitative research requires considerable preparation and planning.* Qualitative researchers must be well trained in observation techniques, interview strategies, and whatever other data collection methods are likely to be necessary to address their research problem. They must have a firm grasp of previous research related to the problem so that they know what to look for and can separate important information from unimportant details in what they observe (some grounded theory studies are exceptions, for reasons you will discover shortly). And they must be adept at wading through huge amounts of data and finding a meaningful order in what, to someone else, might appear to be chaos. For these reasons, a qualitative study can be a challenging task indeed. It is definitely *not* the approach to take if you're looking for quick results and easy answers.

Potential Advantages of a Qualitative Approach

Qualitative research studies typically serve one or more of the following purposes:

- ***Exploration.*** They can help you gain initial insights into what has previously been a little-studied topic or phenomenon.
- ***Multifaceted description.*** They can reveal the complex, possibly multilayered nature of certain situations, settings, processes, relationships, systems, or people.
- ***Verification.*** They allow you to test the validity of certain assumptions, claims, theories, or generalizations within real-world contexts.
- ***Theory development.*** They can enable you to develop new concepts or theoretical perspectives related to a phenomenon.
- ***Problem identification.*** They can help you uncover key problems, obstacles, or enigmas that exist within the phenomenon.
- ***Evaluation.*** They provide a means through which you can judge the effectiveness of particular policies, practices, or innovations.

As a general rule, however, qualitative studies do *not* allow you to identify cause-and-effect relationships—to answer questions such as *What caused what?* or *Why did such-and-such happen?* You will need quantitative research, especially experimental studies, to answer questions of this kind.

QUALITATIVE RESEARCH DESIGNS

In this section, we describe five commonly used qualitative research designs. We give you enough information to help you determine whether one of these approaches might be suitable for your research question, and we briefly describe the specific nature of each methodology. Later in the chapter, we discuss data collection strategies that are more broadly applicable to qualitative research. But our space is limited here. Should you choose to conduct a qualitative study, we urge you to take advantage of the resources listed in the "For Further Reading" section at the end of the chapter.

Remember, too, that of all the designs we describe in this book, qualitative research methods are the least prescriptive. There are no magic formulas, no cookbook recipes for conducting a qualitative study. This book, as well as any others you may read, can give you only general guidelines based on the experiences of those qualitative researchers who have gone before you. In a qualitative study, the specific methods you use will ultimately be constrained only by the limits of your imagination.

Case Study

In a **case study**—sometimes called *idiographic research*—a particular individual, program, or event is studied in depth for a defined period of time. For example, a medical researcher might study the nature, course, and treatment of a rare illness for a particular patient. An educator might study and analyze the instructional strategies that a master teacher uses to teach high school history. A political scientist might study the origins and development of a politician's campaign as he or she runs for public office. Case studies are common not only in medicine, education, and political science, but also in law, psychology, sociology, and anthropology.

Sometimes researchers focus on a single case, perhaps because its unique or exceptional qualities can promote understanding or inform practice for similar situations. At other times researchers study two or more cases—often cases that are either similar or different in certain key ways—to make comparisons, build theory, or propose generalizations; such an approach is called a *multiple* or *collective* case study.

In a typical case study, a researcher collects extensive data on the individual(s), program(s), or event(s) on which the investigation is focused. These data often include observations, interviews, documents (e.g., newspaper articles), past records (e.g., previous test scores), and audiovisual

materials (e.g., photographs, videotapes, audiotapes). In many case studies, the researcher spends an extended period of time on site and regularly interacts with the person or people being studied. The researcher also records details about the context surrounding the case or cases of focus, including information about the physical environment and any historical, economic, and social factors that have bearing on the situation. By portraying such contexts, the researcher helps others who later read the research report to draw conclusions about the extent to which the study's findings might be generalizable to other situations.

A case study may be especially suitable for learning more about a little known or poorly understood situation. It can also be appropriate for investigating how an individual or program changes over time, perhaps as the result of certain conditions or interventions. In either circumstance, it tends to be most useful for generating or providing preliminary support for one or more hypotheses regarding the phenomenon being investigated. Its major limitation is that, especially when only a single case is involved, we cannot be sure that the findings are generalizable to other situations.

Ethnography

In a case study, a researcher looks in considerable depth at a particular person, program, or event. In contrast, in an **ethnography**, a researcher looks in depth at an *entire group*—more specifically, a group that shares a common culture. (The word *ethnography* comes from *ethnos,* Greek for "a nation or other close-knit group of people," and *graph,* "something written or recorded.") The ethnographic researcher studies a group in its natural setting for a lengthy time period, often several months or several years. The focus of investigation is on the everyday behaviors of the people in the group (e.g., interactions, language, rituals), with an intent to identify cultural norms, beliefs, social structures, and other patterns. Ideally, the ethnographic researcher identifies not only explicit cultural patterns—those readily acknowledged by group members or easily observable in objects or behaviors—but also *implicit* patterns—those beliefs and assumptions that have such a below-the-surface, taken-for-granted quality that even group members aren't always consciously aware of them.

Ethnographies were first used in cultural anthropology, but they are now seen in sociology, psychology, education, and marketing research as well. The conception of the type of "culture" that can be studied has also changed over time: Whereas ethnographies once focused on long-standing cultural groups (e.g., people living on the island of Samoa), more recently they have been used to study such "cultures" as those of adult work environments, elementary school classrooms, exclusive social cliques in adolescence, violence-prone adolescent groups, and Internet-based communities[1] (e.g., Bender, 2001; Kozinets, 2010; McGibbon, Peter, & Gallop, 2010; Mehan, 1979; Merten, 2011).

The group chosen for in-depth study should, of course, be appropriate for answering a researcher's general research problem or question. Ideally, it should also be one in which the researcher is a "stranger" and has no vested interest in the study's outcome. A group that the researcher knows well (perhaps one that involves close acquaintances) might be more accessible and convenient, but by being so close to the situation, the researcher may have trouble looking at it with sufficient detachment to gain a balanced perspective and portray an accurate picture of the processes observed (Creswell, 2013).

Site-based fieldwork is the *sine qua non*—the essence—of any ethnography. Prolonged engagement in a group's natural setting gives ethnographic researchers time to observe and record processes that would be almost impossible to learn about by using any other approach. Thus, an essential first step in an ethnographic study is to gain legitimate access to the site. Often researchers must go through a **gatekeeper**, a person who can smooth the way for their entrance into the situation. This individual might be a tribal chief in a community in a developing country, a principal or teacher in a school or classroom, or a program director at a homeless shelter. Then, after gaining entry into the site, researchers must establish rapport with and gain the trust

[1]See Kraut and colleagues (2004) for a good discussion of the research possibilities, potential pitfalls, and ethical issues related to studying people's postings on the Internet.

of the people being studied. At the same time, they must be open about why they are there. The principle of *informed consent* described in Chapter 4 is just as essential in an ethnography as it is in any other type of research.

Initially, researchers cast a broad net, intermingling with everyone and getting an overall sense of the social and cultural context. Gradually, they identify **key informants** who can provide information and insights relevant to their research question and can facilitate contacts with other helpful individuals.

In some ethnographic studies, researchers engage in **participant observation**, becoming immersed in the daily life of the people. In fact, over the course of the study, their role may gradually change from "outsider" to "insider." The advantage here is that they might gain insights about the group and its behaviors that could not be obtained in any other way. The disadvantage is that they may become so emotionally involved as to lose the ability to assess the situation accurately. In some situations, they may even "go native," joining the group and therefore becoming unable to complete the study (Creswell, 2013).

Throughout their fieldwork, ethnographic researchers are careful observers, interviewers, and listeners. Furthermore, they take extensive field notes (written either on site at the time or in private later in the day) in the forms of dialogues, diagrams, maps, and other written materials. Lengthy conversations and significant events can be recorded using audiotapes and videotapes. Researchers may also collect artifacts (e.g., tools, ritualistic implements, artistic creations) and records (e.g., accounting ledgers, personal journals, lesson plans) from the group. In order to test hypotheses about a group's unconsciously shared beliefs or assumptions, some ethnographic researchers occasionally conduct *breaching experiments*—that is, they intentionally behave in ways they suspect might violate an unspoken social rule—and observe people's reactions (Mehan & Wood, 1975).

We must caution you that conducting a good ethnography requires both considerable patience and considerable tolerance. One experienced ethnographer has described the process this way:

> It requires a great patience under any circumstances for me to "sit and visit." A rather inevitable consequence of being inquisitive without being a talker is that my conversational queries usually prompt others to do the talking. During fieldwork, I make a conscious effort to be sociable, thus providing opportunities for people to talk to me. . . . I never confront informants with contradictions, blatant disbelief, or shock, but I do not mind presenting myself as a bit dense, someone who does not catch on too quickly and has to have things explained. . . . (Wolcott, 1994, p. 348)

An ethnography is especially useful for gaining an understanding of the complexities of a particular sociocultural group. It allows considerable flexibility in the methods used to obtain information, which can be either an advantage (to an experienced researcher who knows what to look for) or a disadvantage (to a novice who may be overwhelmed and distracted by unimportant details). Hence, if you decide that an ethnography is the approach most suitable for your research problem, we urge you to get a solid grounding in cultural anthropology before you venture into the field (Creswell, 2013).

Phenomenological Study

In its broadest sense, the term *phenomenology* refers to a person's perception of the meaning of an event, as opposed to the event as it exists external to the person. A **phenomenological study** is a study that attempts to understand people's perceptions and perspectives relative to a particular situation. In other words, a phenomenological study tries to answer the question *What is it like to experience such-and-such?* For instance, a researcher might study the experiences of people caring for a chronically or terminally ill relative, living in an abusive relationship, or home-schooling a child.

In some cases, the researcher has had personal experience related to the phenomenon in question and wants to gain a better understanding of the experiences of others. By looking at multiple perspectives on the same situation, the researcher can then make some generalizations of *what something is like* from an insider's perspective.

Phenomenological researchers depend almost exclusively on lengthy interviews (perhaps 1 to 2 hours in length) with a small, carefully selected sample of participants. A typical sample size is from 5 to 25 individuals, all of whom have had direct experience with the phenomenon being studied.

The actual implementation of a phenomenological study is as much in the hands of the participants as in the hands of the researcher. The phenomenological interview is often a relatively unstructured one in which the researcher and participants work together to "arrive at the heart of the matter" (Tesch, 1994, p. 147). The researcher listens closely as participants describe their everyday experiences related to the phenomenon; the researcher must also be alert for subtle yet meaningful cues in participants' expressions, pauses, questions, and occasional sidetracks. A typical interview looks more like an informal conversation, with the participant doing most of the talking and the researcher doing most of the listening.

Throughout the data collection process, phenomenological researchers try to suspend any preconceived notions or personal experiences that may unduly influence what they "hear" participants saying. Such suspension—sometimes called *bracketing* or *epoché*—can be extremely difficult for researchers who have personally experienced the phenomenon under investigation. Yet it is essential if they are to gain an understanding of the typical experiences that people have had. The ultimate goal of a phenomenological study should be—not only for the researcher but also for readers of the final research report—to provide a sense that "I understand better what it is like for someone to experience that" (Polkinghorne, 1989, p. 46).

Grounded Theory Study

Of all the research designs described in this book, a **grounded theory study** is the one *least* likely to begin from a particular theoretical framework. On the contrary, the major purpose of a grounded theory approach is to *begin with the data and use them to develop a theory.* The term *grounded* refers to the idea that the theory that emerges from the study is derived from and rooted in data that have been collected in the field rather than taken from the research literature. Grounded theory studies are especially helpful when current theories about a phenomenon are either inadequate or nonexistent.[2]

Typically, a grounded theory study focuses on a *process* related to a particular topic—including people's actions and interactions—with the ultimate goal of developing a theory about the process. The approach has its roots in sociology (Glaser & Strauss, 1967) but is now also used in such fields as anthropology, geography, education, nursing, psychology, and social work. It has been used effectively for a wide range of topics—for instance, to study children's eating habits, college students' thoughts and feelings during classroom discussions, and workers' stress levels in public service agencies (Do & Schallert, 2004; Kime, 2008; Skagert, Dellve, Eklöf, Pousette, & Ahlborg, 2008).

As is true for the qualitative designs previously described, data collection in a grounded theory study is field-based, flexible, and likely to change over the course of the investigation. Interviews typically play a major role in data collection, but observations, documents, historical records, videotapes, and anything else of potential relevance to the research question might also be used. The only restriction is that the data collected *must* include the perspectives and voices of the people being studied (Charmaz, 2002, 2014; Corbin & Strauss, 2008).

More so than in any other qualitative methodology, data analysis in a grounded theory study begins almost immediately, at which point the researcher develops *categories* to classify the data. Subsequent data collection is aimed at *saturating* the categories—in essence, learning as much about them as possible—and at finding any disconfirming evidence that point to possible revisions in the categories identified or in interrelationships among them. The theory that ultimately evolves is one that includes numerous concepts and interrelationships among those concepts; in other words, it has *conceptual density* (Schram, 2006).

Virtually all experts agree that grounded theory researchers should have a firm grasp of general concepts and theoretical orientations in their discipline as a whole; hence, an in-depth literature review early in the process is essential. However, experts disagree about whether researchers should look closely at previous findings *directly related to the present research problem* before collecting

[2]Some researchers associate the term *grounded theory* with a particular method of data analysis—in particular, that of Corbin and Strauss (2008; Strauss & Corbin, 1990)—and suggest the term *emergent theory* as a broader, less prescriptive label for this approach (e.g., Jaccard & Jacoby, 2010).

and analyzing data. For example, Glaser (1978) has argued that too much advance knowledge of earlier research regarding a topic may limit a researcher's ability to be open-minded about how to analyze and interpret the data collected. In contrast, many others suggest that the advantages of conducting a relatively thorough literature review outweigh the disadvantages; in particular, previous works and writings about a topic can often help a researcher think more clearly and insightfully about the collected data (e.g., Hesse-Biber, 2010; Jaccard & Jacoby, 2010). Our own advice is to learn as much as you can about your research topic through a thorough review of the related literature but *to refrain from forming specific hypotheses about what you yourself might find.*

Content Analysis

A **content analysis** is a detailed and systematic examination of the contents of a particular body of material for the purpose of identifying patterns, themes, or biases. Content analyses are typically performed on *forms of human communication,* including books, newspapers, personal journals, legal documents, films, television, art, music, videotapes of human interactions, transcripts of conversations, and Internet blog and bulletin board entries.[3] For example, a researcher might use a content analysis to determine what religious symbols appear in works of art, how middle school science texts portray the nature of science, or what attitudes are reflected in the speeches or newspaper articles of a particular era in history. As you might infer from these examples, content analyses are found in a wide variety of disciplines, including the fine arts, education, history, psychology, journalism, and political science.

Of the five designs described in this chapter, a content analysis is apt to involve the greatest amount of planning at the front end of the project. The researcher typically defines a specific research problem or question at the very beginning (e.g., "Do contemporary children's books reflect traditional gender stereotypes?", "What religious symbols appeared in early Byzantine architecture, and with what frequency, during the years 527–867?"). Furthermore, the researcher takes measures to make the process as objective as possible. The following steps are typical:

1. The researcher identifies the specific body of material to be studied. If this body is relatively small, it is studied in its entirety. If it is quite large (e.g., if it consists of all newspaper articles written during a particular time period), a sample (perhaps a random sample) is selected.
2. The researcher defines the characteristics or qualities to be examined in precise, concrete terms. The researcher may identify specific examples of each characteristic as a way of defining it more clearly.
3. If the material to be analyzed involves complex or lengthy items (e.g., works of literature, transcriptions of conversations), the researcher breaks down each item into small, manageable segments that are analyzed separately.
4. The researcher scrutinizes the material for instances of each characteristic or quality defined in Step 2. When judgments are objective—for instance, when the study involves looking for the appearance of certain words in a text—only one judge, or *rater,* is necessary. When judgments are more subjective—for instance, when the study involves categorizing discrete sections of textbooks as conveying various messages about the nature of science—two or three raters are typically involved, and a composite of their judgments is used.

Content analyses are not necessarily stand-alone designs. For example, a systematic content analysis might be an integral part of the data analysis in a phenomenological study (e.g., see Wennick, Lundqvist, & Hallström, 2009). A content analysis might also be used to flesh out the complex, multidimensional aspects of a descriptive or experimental study, resulting in a *mixed-methods design* with both qualitative and quantitative elements.

Even when a content analysis *is* the sole research methodology, it's apt to have a quantitative component. In many instances, quantification may involve simply counting the frequencies

[3]Again, we refer you to Kraut and colleagues (2004) regarding ethical issues related to studying people's postings on the Internet.

CONCEPTUAL ANALYSIS EXERCISE Choosing a Qualitative Research Design

Following are brief summaries of five potential research projects. Identify the qualitative methodology that is probably most appropriate for each project. The answers appear after the "For Further Reading" section at the end of the chapter.

1. In an effort to learn the nature and appeal of long-standing men's social groups, a researcher plans to spend a 9-month period with a local chapter ("lodge") of the Benevolent and Protective Order of Elks. By observing and interacting with the Elks, he hopes to observe the chapter's meetings, rituals, and charitable activities and to discover the chapter's beliefs, values, goals, and interpersonal dynamics.
2. A researcher wants to determine to what degree and in what ways television commercials might portray men and women in traditionally gender-stereotypical ways (e.g., how often men versus women are shown cleaning house, how often men versus women are shown making important business decisions).
3. In order to learn how grassroots political parties emerge and develop over time, a researcher wants to study the origins and evolution of three recently established "Tea Party" groups, one in her own state and two in neighboring states.
4. A researcher is intrigued by Asperger syndrome, a cognitive disability in which people have average or above-average intelligence and language skills but poor social skills and little or no ability to interpret other people's nonverbal social cues (e.g., body language). The researcher wants to find out what it is like to be an adolescent with this syndrome—how a teenager is apt to feel about having few or no friends, being regularly excluded from classmates' social activities, and so on.
5. A researcher wants to determine how doctors, nurses, and other hospital staff members coordinate their actions when people with life-threatening traumatic injuries arrive at the emergency room. The researcher can find very little useful research on this topic in professional journals.

COLLECTING DATA IN QUALITATIVE RESEARCH

As you have seen, qualitative researchers often use multiple forms of data in any single study. They might use observations, interviews, objects, written documents, audiovisual materials, electronic entities (e.g., e-mail messages, Internet websites), and anything else that can help them answer their research question. Potential sources of data are limited only by a researcher's open-mindedness and creativity. For example, in a school setting, a researcher might consider where various students are seated in the lunch room, what announcements are posted on the walls, or what messages are communicated in graffiti (Eisner, 1998). In an ethnographic study of a cultural group, a researcher might ask one or more participants to keep a daily journal or to discuss the content and meaning of photographs and art objects (Creswell, 2013).

While collecting data, many qualitative researchers also begin jotting notes—sometimes called **memos**—about their initial interpretations of what they are seeing and hearing. Some of these "notes-to-self" might involve emerging themes in people's actions and statements. Others might make note of initial hunches and intuitions to pursue through further observations or interview questions. Still others might be preliminary theories about possible underlying dynamics within a social group.

Many qualitative studies are characterized by an **emergent design**, in which data collected early in the investigation influence the kinds of data the researcher subsequently gathers. The flexibility of qualitative methodologies is an advantage for experienced researchers but often a disadvantage for novices, who may not have sufficient background or training to determine how best to adjust data collection strategies midway through a study. Thus, many experts suggest

that a novice researcher set forth a definite, fairly structured plan for data collection—a strategy that can minimize the degree to which the researcher wanders off into intriguing but ultimately unproductive diversions.

A predetermined, well-thought-out plan is also essential when submitting a qualitative research proposal to an internal review board (IRB). Most importantly, data collection methods must be consistent with the ethical principles presented in Chapter 4. The researcher must take precautions not to expose people (or animals) to unnecessary physical or psychological harm—as could happen, say, if the researcher were to inquire about highly personal and emotionally charged topics. The people being studied must know the nature of the study and be willing participants in it (this is *informed consent*), and any data collected should not be traceable back to particular individuals (thus maintaining participants' *right to privacy*). One common way of keeping personal data confidential is to assign various pseudonyms to different participants and to use those pseudonyms both during data collection and in the final research report.

PRACTICAL APPLICATION Addressing Validity and Reliability Issues in Qualitative Data Collection

As you should recall, Chapter 4 includes a section called "Validity and Reliability in Measurement." Qualitative researchers don't necessarily *measure* things—at least not in the numerical sense of the word. Nevertheless, they must be concerned about both the validity and the reliability of the data they collect. In particular, the data they collect must be both (a) reasonably *accurate* with regard to the characteristics and dynamics of the entities or situation being studied (this is *validity*) and (b) *consistent* in the patterns and dynamics they reflect (this is *reliability*).

A particular strength of qualitative methods is that a perceptive researcher might discern underlying patterns and dynamics in social interactions or cultural artifacts that a standardized, quantitative measurement instrument would never illuminate. In a sense, *the researcher is an instrument* in much the same way that an oscilloscope, questionnaire, or multiple-choice achievement test is an instrument. The potential downside of this instrument—the human mind—is that it can be biased by its preconceived theories and expectations, and such biases can adversely affect the quality of the data obtained.

Qualitative researchers use a variety of strategies to enhance the validity and reliability—and hence the credibility—of the data they collect. Following are five important strategies during the *data collection* phase of a qualitative study (we identify strategies related to *data analysis and interpretation* in Chapter 11):

- ***Reflexivity.*** Good qualitative researchers actively try to identify personal, social, political, or philosophical biases that are likely to affect their ability to collect and interpret data—this self-reflection is known as **reflexivity**—and take whatever steps they can to reduce such influences.
- ***Triangulation.*** Many qualitative researchers use a strategy called **triangulation**: They collect multiple forms of data related to the same research question, with the goal of finding consistencies or inconsistencies among the data. For example, imagine that a researcher wants to study the behaviors of an especially exclusive group of snobbish but so-called "popular" girls at a public high school. This researcher might not only interview both members and nonmembers of the group but also observe the girls in action in various locations in and around school—for instance, observing seating patterns in the cafeteria, group clusters in the hallways and school yard, and verbal interaction patterns during class sessions. The researcher might also scan school records regarding which students are members (and possibly officers or captains) of various extracurricular clubs and sports teams.
- ***Clearly distinguishing between data and memos.*** Right from the get-go, a qualitative researcher must keep interpretations separate from actual observations. For example, consider the ethnographic researcher who decides to take only handwritten notes in the field, perhaps as a way of blending in better with the social environment than would be possible with, say, a laptop or video camera. This researcher might draw a vertical line down the

middle of each page, recording observations, interview responses, and any helpful graphics (e.g., maps, diagrams) in the left column and jotting memos about these things in the right column. Only in this way can the researcher separate *fact* (what the researcher is actually seeing and hearing) from what could possibly be *fiction* (what the researcher currently thinks might be going on).

- ***Seeking of exceptions and contradictory evidence.*** By nature, human beings seem to be predisposed to look for and identify patterns and consistencies in their physical worlds (e.g., see Mandler, 2007; Rakison & Oakes, 2003). Furthermore, once they have zeroed in on their conclusions about these patterns and consistencies, they're often reluctant to revise their beliefs (recall the discussion of *confirmation bias* in Figure 1.3 in Chapter 1). A good qualitative researcher actively fights such mental predispositions, in part by continually asking the questions "Might I be wrong?" and "What disconfirming evidence can I find?" and then intentionally seeking out the answers.
- ***Spending considerable time on site.*** Many qualitative studies require extensive data collection in the field; such is true for virtually any ethnography and for many case studies, phenomenological studies, and grounded theory studies. Just a brief visit to the site under investigation—popping in and popping out, as it were—is unlikely to yield the quantity and quality of data (including potentially contradictory observations) essential for drawing accurate, multifaceted understandings of any complex phenomenon.

In planning for data collection, qualitative researchers must also identify one or more appropriate *samples* from which to acquire data. Furthermore, they are apt to rely heavily on *observations* and/or *interviews* as sources of data. We offer suggestions related to each of these three topics in the three Practical Application sections that follow. Some of our suggestions can, in one way or another, enhance the validity and reliability of the data obtained.

PRACTICAL APPLICATION Selecting an Appropriate Sample for a Qualitative Study

Qualitative researchers might draw their data from a variety of sources—not only from people but perhaps also from objects, text materials, and audiovisual and electronic records. The particular entities they select for analysis comprise their sample.

Only rarely—for instance, when a study involves a content analysis of a small number of items—can qualitative researchers look at *everything* that has potential relevance to a research problem. More typically, they must be choosy about the data they gather and analyze and, as a result, will get an incomplete picture of the phenomenon in question. One experienced qualitative researcher has described the situation this way:

> Whether observing, interviewing, experiencing, or pursuing some combination of strategies, you cannot be everywhere at once or take in every possible viewpoint at the same time. Instead . . . you develop certain perspectives by engaging in some activities or talking to certain people rather than others. . . . You build assertions toward the never-quite-attainable goal of "getting it right," approximating realities but not establishing absolutes.
>
> Your task, both derived from and constrained by your presence, is thus inherently interpretive and incomplete. The bottom line is that there is no bottom line: It is not necessary (or feasible) to reach some ultimate truth for your study to be credible and useful. (Schram, 2006, p. 134)

How you identify your sample must depend on the research question(s) you want to answer. If you want to draw inferences about an entire population or body of objects, you must choose a sample that can be presumed to *represent* that population or body. Ideally, this sample is chosen through a completely random selection process or through a process that incorporates appropriate proportions of each subgroup within the overall group of people or objects. For possible ways of choosing such a sample, return to the discussion of probability sampling in Chapter 6. (Remember, truly effective researchers often draw on methodologies from diverse research traditions.)

In other circumstances, however, you might need to be intentionally *non*random in your selection of data sources. In particular, your sampling would be selective, or *purposive:* You would choose those individuals or objects that will yield the most information about the topic under investigation. For example, grounded theory researchers tend to engage in **theoretical sampling**, choosing data sources that are most likely to help them develop a theory of the process in question. Later, they may employ **discriminant sampling**, returning to particular data sources that can help them substantiate the theory. (As you should recall from Chapter 6, some descriptive quantitative researchers also engage in purposive sampling.)

A novice qualitative researcher might ask *How large should my sample be? How much is enough?* There are no easy, cut-and-dried answers to these questions, but we offer several suggestions to guide decision making:

- Be sure that the sample includes not only seemingly "typical" but also seemingly "nontypical" examples.
- When a power hierarchy exists—as it does in the workplace and in many clubs and communities—sample participants from various levels in the hierarchy. For example, in the workplace, you might interview both bosses and employees; in a club or community, you might interview not only highly active, influential members but also less involved individuals (e.g., see Becker, 1970).
- Actively look for cases that can potentially discredit emerging hypotheses and theories.
- If appropriate for your research problem, sample from diverse contexts or situations.

Ideally, the sample should provide information not only about how things are *on average* but also about how much *variability* exists in the phenomenon under investigation.

In some instances, a research problem is best addressed by sampling from a large geographical area, perhaps one that includes diverse cultural groups. For example, in a dissertation project involving the experiences of White women who were raising biological children of mixed or other races,[4] doctoral student Jennifer Chandler (2014) wanted to interview mothers from diverse locations across the United States—locations that would differ in demographic makeup and possibly also in attitudes regarding multiracial families. To obtain such a sample, she created an "Invitation to Participate" letter that described the purpose of her study, the characteristics of desired participants, and the general nature of the interviews she would conduct. Many individuals across the country helped her distribute the invitation, including (a) personal friends and colleagues; (b) people she met at several professional conferences; (c) officers in parent-teacher organizations in numerous public school districts (e.g., Los Angeles, Houston, Denver, New York); and (d) people who had contributed to Internet blogs about topics related to interracial parenting. The resulting sample included 30 mothers from towns and cities in more than a dozen states across the country. It was certainly not a random sample, but it helped Chandler capture the diversity in experiences that mothers living in various geographical and cultural settings were likely to have had.

PRACTICAL APPLICATION Making Observations in a Qualitative Study

In the observation studies described in Chapter 6, observations typically have a limited, prespecified focus, and procedures are set in place in advance for quantifying the observations in some way, perhaps with a rating scale. In contrast, observations in a qualitative study are intentionally unstructured and free-flowing: The researcher shifts focus from one thing to another as new and

[4]More precisely, the sample included mothers who (a) *identified* themselves as being non-Hispanic White women and (b) *identified* their children as being of mixed or other races. Chandler's capitalization of "White" when referring to a racial group is consistent with APA style (2010).

potentially significant objects and events present themselves. The primary advantage of conducting observations in this manner is flexibility: The researcher can take advantage of unforeseen data sources as they surface. Observations are often recorded in great detail, perhaps with field notes or videotapes that capture the wide variety of ways in which people or other animal species act and interact. From these data, the researcher can construct a complex yet integrated picture of how certain humans or nonhumans spend their time.

Such an approach has its drawbacks, of course. A researcher (especially a novice researcher) won't always know what things are most important to look for, especially at the beginning, and so may waste considerable time observing and recording trivialities while overlooking entities that are more central to the research question. A second disadvantage is that *by his or her very presence,* the researcher may influence what people say and do or may change how significant events unfold (recall the discussion of *reactivity* in Chapter 4).

Recording events can be problematic as well. Written notes are often insufficient to capture the richness of what one is observing. Yet audiotapes and videotapes aren't always completely dependable either. Background noises may make tape-recorded conversations only partially audible. A video camera can capture only the events happening in a small, focused area. And the very presence of tape recorders and video cameras may make some participants uncomfortable.

If you decide to conduct observations as part of a qualitative study, we offer these recommendations:

1. Before you begin your study, experiment with various data recording strategies (field notes, audiotapes, videotapes), identify the particular methods that work best for you, and practice using them in diverse contexts.
2. When you first enter a research site, have someone introduce you to the people you hope to observe. This is the time to briefly describe your study and get potential participants' informed consent.
3. As you observe, remain relatively quiet and inconspicuous, yet be friendly to anyone who approaches you. You certainly don't want to discourage people from developing relationships with you and—perhaps later—taking you into their confidence.

Also remember a strategy alluded to earlier: *Clearly distinguish between your actual observations (data) and your interpretations (memos).* This strategy is important for two reasons. First, you need to be as objective as you can in the records you keep of what might otherwise be only subjective impressions. And second, your interpretations of what you have seen and heard may very well change over the course of the study.

PRACTICAL APPLICATION Planning and Conducting Interviews in a Qualitative Study

Interviews can often yield a rich body of qualitative information. A researcher might ask questions related to any of the following (Silverman, 1993):

- Facts (e.g., biographical information)
- People's beliefs and perspectives about the facts
- Feelings
- Motives
- Present and past behaviors
- Standards for behavior (i.e., what people think *should* be done in certain situations)
- Conscious reasons for actions or feelings (e.g., why people think that engaging in a particular behavior is desirable or undesirable)

Interviews in a qualitative study tend not to be as tightly prescribed and structured as the interviews conducted in a quantitative study. A second difference is the general "feel" of the

the interviewee's approval. In his final thesis, the researcher acknowledged his interviewees and noted that they had inspected and approved all of their quoted statements. With the use of such strategies, the researcher and the readers of his report could all be confident that the participants' thoughts and opinions were accurately represented.

In summary, the researcher's use of the following steps led to a highly productive research effort:

1. Set up the interview well in advance.
2. Send the agenda of questions to ask the interviewee.
3. Ask for permission to tape the conference.
4. Confirm the date immediately in writing.
5. Send a reminder, together with another copy of the questions, 10 days before the interview.
6. Be prompt; follow the agenda; offer a copy of the questions in case the original copy has been mislaid.
7. After the interview, submit a transcript of the interview, and get from the interviewee either a written acknowledgment of its accuracy or a corrected copy.
8. After incorporating the material into a semifinal draft of the research report, send that section of the report to the interviewee for final approval and written permission to use the data in the report.

USING TECHNOLOGY

Using Technology to Facilitate Collection of Interview Data

With appropriate software, most laptops and many smartphones can serve as audio recorders. And, of course, videos recorded on a camcorder can be easily downloaded to a personal computer. Meanwhile, transcription software (e.g., HyperTRANSCRIBE) lets you mark key points in a videotaped or audiotaped interview, retrieve desired pieces of information quickly, and slow down what you have recorded so that you can transcribe it more easily. Other software programs (e.g., Dragon Naturally Speaking) will even do your transcribing for you.

In some cases, you can conduct qualitative interviews long-distance through various Internet mechanisms, including e-mail, Skype, or video conferencing. Focus groups might also be conducted online, perhaps through Internet-based chat rooms or bulletin boards (e.g., see Krueger & Casey, 2009, for suggestions). Keep in mind, however, that ethical standards don't fly out the window simply because you're conversing with people in cyberspace rather than in the same room. You must still seek participants' (or parents') informed consent, and you must protect participants' privacy. Furthermore, you must ensure that participants have appropriate characteristics and qualifications for your investigation—something that may be difficult to determine if you never see these individuals in the flesh.

CRITERIA FOR EVALUATING QUALITATIVE RESEARCH

How do readers, reviewers, and practitioners assess the worth of a qualitative proposal or research study? What characteristics are essential to a good study? What makes one study "excellent" and another study only "marginal"?

Experienced qualitative researchers have offered a variety of standards that might be used to evaluate a qualitative study (Altheide & Johnson, 1994; Creswell, 2013; Eisner, 1998; Gall, Gall, & Borg, 2007; Glaser, 1992; Howe & Eisenhardt, 1990). We have boiled down their suggestions to nine general criteria:

1. ***Purposefulness.*** The research question drives the methods used to collect and analyze data, rather than the other way around.

2. ***Explicitness of assumptions and biases.*** The researcher identifies and communicates any assumptions, beliefs, values, and biases that may influence data collection and interpretation.
3. ***Rigor.*** The researcher uses rigorous, precise, and thorough methods to collect, record, and analyze data. The researcher also takes steps to remain as objective as possible throughout the project.
4. ***Open-mindedness.*** The researcher shows a willingness to modify hypotheses and interpretations when newly acquired data conflict with previously collected data.
5. ***Completeness.*** The researcher depicts the object of study in all of its complexity. The researcher spends sufficient time in the field to understand all nuances of a phenomenon; describes the physical setting, behaviors, and perceptions of participants; and ultimately gives readers an in-depth, multifaceted picture of the phenomenon (i.e., *thick description*).
6. ***Coherence.*** The data yield consistent findings, such that the researcher can present a portrait that "hangs together." Multiple data sources converge onto consistent conclusions *(triangulation),* and any contradictions within the data are reconciled.
7. ***Persuasiveness.*** The researcher presents logical arguments, and the weight of the evidence suggests one interpretation to the exclusion of others.
8. ***Consensus.*** Other individuals, including the participants in the study and other scholars in the discipline, agree with the researcher's interpretations and explanations.
9. ***Usefulness.*** The project yields conclusions that promote better understanding of the phenomenon, enable more accurate predictions about future events, or lead to interventions that enhance the quality of life.

In this chapter we have addressed issues related to only some of these criteria—especially issues related to purposefulness, rigor, and open-mindedness. We address issues related to other criteria in discussions of data analysis in Chapter 11 and report writing in Chapter 13.

PRACTICAL APPLICATION Planning the Logistics of a Qualitative Study

As should be clear by now, a qualitative research project is not something to be entered into casually. One key consideration is that, regardless of the kinds of data involved, data collection in a qualitative study takes a great deal of time. The researcher should record any potentially useful data thoroughly, accurately, and systematically, using field notes, sketches, photographs, audio recordings, videos, or some combination of these. And as you will discover in Chapter 11, data organization and analysis must be equally meticulous and time-intensive.

If you think a qualitative approach might be suitable for your purposes, you may want to do a pilot study first to find out whether you feel comfortable with the ambiguity and relative lack of structure in the process. We urge you, too, to learn as much as you can about qualitative research strategies, perhaps by reading some of the sources listed in the "For Further Reading" section at the end of this chapter. Once you have determined that you have both the time and skills to conduct a qualitative study, you may find the following checklist helpful in your planning.

_____ 10. What role will you, as the researcher, assume?

_____ 11. How will you ensure anonymity and confidentiality for the participants?

_____ 12. What procedures will you follow, and in what order?

_____ 13. What technological tools can assist you in data collection?

A SAMPLE DISSERTATION

As an example of a qualitative research study, we present excerpts from Robin Smith's doctoral dissertation conducted at Syracuse University (Smith, 1999). The study was a multiple case study that also incorporated elements of grounded theory research and content analysis.

The study focused on five high school students who had significant intellectual disabilities. In particular, it examined the nature of the students' involvement and participation in high school classrooms. It also looked at teachers' perceptions and interpretations of the students' disabilities and academic performance.

The dissertation's "Method" chapter begins with an overview of the research strategies used and a rationale for selecting the individuals to be studied. It then presents more specific information about each of the five students: Gerald, Trish, Nick, Tyrone, and Abe (all pseudonyms). We pick up the chapter at the point where it begins a discussion of data collection. As we have done in preceding chapters of this book, we present excerpts on the left and a running commentary on the right.

knowledge . . . for my observations and interviews, I kept an open mind to the notion that special education settings do not preclude learning, may even enhance it, and that observing the special education academic experiences could also inform me about student engagement and how they [students] participated in the academic activities.

Here the author is looking for disconfirming evidence, one effective strategy for minimizing the influence of a researcher's biases on data interpretation.

LEAVING THE FIELD

The process of leaving the field was gradual. I was learning less and less from observations by the end of spring. Completing ceasing the first school year observation was precipitated by the beginning of the university summer session and my assignment to spend all day in a suburban school as a student teacher. I was assigned to Trish's summer school class the second summer session and took notes on that experience. I visited her twice in the fall but was excluded from her general education classes due to overcrowding. Also in the fall, I spent two days with Tyrone. . . . By then I had been analyzing data and felt the main thing lacking was the assessment of material from official records. Waiting until the following summer to look into the records proved wise, as I was able to find them a rich source of data. I actually eased my way out of the field (Bogdan & Biklen, 1992, pp. 104–105) rather than leaving, keeping contacts with many of my informants and calling to find out what is going on with a student or to clarify a question.

In grounded theory terminology, the author has probably saturated *her categories at this point: Any additional information is shedding little or no new light on the subject matter.*

Notice that the author didn't just disappear from the scene. Instead, she continued to maintain contact with her participants after her research was completed.

Note: Excerpt is from *Academic Engagement of High School Students With Significant Disabilities: A Competence-Oriented Interpretation* (pp. 18–30) by R. M. Smith, 1999, unpublished doctoral dissertation, Syracuse University, Syracuse, New York. Reprinted with permission.

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ANSWERS TO THE CONCEPTUAL ANALYSIS EXERCISE "Choosing a Qualitative Research Design":

1. The researcher wants to learn about the general *culture* of an Elks group; hence, an *ethnography* is most appropriate.
2. A *content analysis* is called for here—in particular, a systematic sampling and analysis of television commercials that are broadcast within a specified time period.
3. By focusing on three specific examples of a grassroots political party, the researcher is presumably intending to conduct a *multiple case study.*
4. The focus here is on how adolescents *perceive* their situation, making a *phenomenological study* especially relevant to the research problem.
5. Because the research question involves a process—human interaction—and very little literature exists to shed light on the question, a *grounded theory* study is probably in order here.