THE HOW TO OF QUALITATIVE RESEARCH
SAGE was founded in 1965 by Sara Miller McCune to support the dissemination of usable knowledge by publishing innovative and high-quality research and teaching content. Today, we publish over 900 journals, including those of more than 400 learned societies, more than 800 new books per year, and a growing range of library products including archives, data, case studies, reports, and video. SAGE remains majority-owned by our founder, and after Sara’s lifetime will become owned by a charitable trust that secures our continued independence.

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PART I

JUMP STARTING YOUR QUALITATIVE RESEARCH PROJECT
INTRODUCTION: FROM WHY TO HOW IN QUALITATIVE RESEARCH
I want to understand the world from your point of view. I want to know what you know in the way you know it. I want to understand the meaning of your experience, to walk in your shoes, to feel things as you feel them, to explain things as you explain them. Will you become my teacher and help me understand? (Spradley, 1979: 34)

Spradley originally made this classic statement about ethnographers; yet for many it captures the broader essence of what it means to be a qualitative researcher. As qualitative researchers we are interested in describing the context and meaning of individual and group life and understanding how people make sense of the world around them. Our methodological toolkit allows us to examine how broader structural, historical and cultural conditions influence people’s perspectives, experiences and choices. Interviews, field observations, and physical and social traces tell a unique story about the complexity of human development and group life.

Based on these qualities, it is no surprise that qualitative research has arrived. As studies continue to multiply, so too have the number of books about qualitative research methods. If you are new to qualitative methods, you will find no shortage of excellent books that broadly describe types of qualitative research, questions that different methods address, approaches to qualitative research, and ethical issues (e.g., Creswell, 2013; Hesse-Biber et al., 2010; Silverman, 2009). Other sources focus on a specific approach such as grounded theory (e.g., Corbin and Strauss, 2007). Complementing these books, you can also find edited volumes that provide useful overviews of the field, including discussions of competing paradigms and broad explanations of interpretive traditions (e.g., Denzin and Lincoln, 2011).

If however you are ready to design and collect qualitative data, you will not be so fortunate. In our search for the right book, we found few that take researchers from the ‘what’ and ‘why’ to the ‘how’ of qualitative research. The ‘How To’ of Qualitative Research fills this void and will take you from understanding what qualitative methods are all about, to knowing how to execute a high quality qualitative research project. We have written this book to be accessible to more advanced undergraduate students, while providing enough methodological detail to make this book useful for graduate and postgraduate researchers interested in conducting a project that includes qualitative data.

A PRAGMATIC APPROACH TO QUALITATIVE RESEARCH: WHAT THIS BOOK IS (AND IS NOT) ABOUT

You will benefit most from our book if you have already taken an introductory research methods course and are familiar with the variety of approaches, such as feminist or post-positivist ontological and epistemological positions, and types of methods, such as interviews and field research. Why? Well our book is not about is describing or theorizing qualitative methods, but rather doing qualitative research. That is, regardless of your ‘approach’, you still need to know how to design your project and data collection instruments. Our goal is to provide you with the practical tools you will need to answer critical questions such as
‘What are some ways to sample potential participants?’; ‘How do I construct an interview schedule?’; ‘How many interviews are enough?’; ‘Should I be thinking of a single case study or a comparative study?’; ‘What and how should I record in the field?’; ‘How do I manage participants in a focus group’; and ‘What other sources of data should I consider?’.

We take a practical approach to doing qualitative research and do not subscribe to or promote any particular approach or method of qualitative research. Instead, the book is written from a pragmatist perspective (Patton, 2002), which subscribes to the philosophy that you should select ‘the right tool for the job’. To do this, this book has the following features:

- We bring together exemplary technical guides and research studies in one book to offer detailed explanations of qualitative methodology and design. Drawing on the trusted sources from some masters of qualitative research (e.g., their own course outlines), along with a thorough literature review and our own experience as qualitative researchers, allowed us to distil the most salient strategies for designing, collecting and analysing qualitative data.
- Our book includes clear step-by-step instructions for developing a research design and complementary research tools (e.g., interview schedule). Our book provides some background (the ‘what’ and the ‘why’ part of qualitative research), but focuses primarily on detailing how you actually create and execute these techniques.
- Our book identifies the practical issues that many budding qualitative researchers face. Our book contains a number of useful pedagogical features, including boxed summaries, diagrams, checklists (e.g., creating an interview bag), and templates for organizing and collecting data (e.g., demographic survey). These tools can be used as is, or easily modified to suit the specific needs of your study.
- If you are an instructor, we offer a number of complementary teaching materials, including PowerPoint slides and a testbank. The aforementioned student exercises, templates and checklists can also be easily used as effective in-class exercises or as assignments.

Our book is about preparing you to make informed choices that allow you best to answer your research questions and make convincing statements about your data. How? Well when you have forged a clear methodological pathway you will be in a better position to build trustworthiness and credibility into your project (Lincoln and Guba, 1985). Trustworthy and credible qualitative research has the following qualities:

- Self-Reflexivity: You are able to show that you considered the ways in which your personal characteristics and history shapes how you approached, collected and analysed your data.
- Transparency: You are able to describe and document your data collection and analysis procedures in a manner that can be reviewed and scrutinized by others.
- Evidenced-Based: You are able to demonstrate clear connections between your data, how you answered your research questions and any conclusions you made about the focus of your inquiry.
- Built-in Credibility and Trustworthiness Techniques: You are able to show that you thoughtfully and purposefully built in specific credibility and trustworthiness enhancing techniques such prolonged engagement, triangulation, thick description and member checking (Lincoln and Guba, 1985).
Trustworthy and credible qualitative research does not happen by accident or luck, it happens through good research design. This book shows you how to accomplish this by detailing the specific methodological strategies for conducting high quality qualitative research.

**HOW TO USE THIS BOOK**

Each chapter can be used as a stand-alone piece. If you are a less experienced researcher, you will need to start with ‘How to Conceptualize Research’ (Chapter 2) and ‘How to Design a Qualitative Project and Create a Research Question’ (Chapter 3) before moving on to the chapters about the specific qualitative methodology that will best answer your research question (Chapters 4, 5, 6 and 7). Chapters 8 and 9 will take you through the ‘how to’ of data analysis and writing up qualitative research projects. If you are a more experienced researcher, you will likely narrow in on different sections and chapters of this book that address a new kind of project, including the chapters on focus groups and unobtrusive methods. If you are an instructor, this book can be easily adapted for a one-term or two-term course as either the main or complementary text depending on whether it is an introduction or more advanced methods course.

This book is divided into three main parts.

Part I will provide you with the tools you need to conceptualize and design your project.

- **Chapter 2** is about conceptualization, the art and practice of formulating a research project. This chapter will take you through the process of moving from a general research interest to a concrete and researchable research problem.
- **Chapter 3** is about research design. This chapter is premised on the belief that the research question drives the method. To this end, the chapter outlines different types of research questions and the optimal qualitative methods for answering them.

Part II outlines the strategies and methods for collecting various kinds of qualitative data, including interviews, focus groups, field research and unobtrusive methods.

- **Chapter 4** is about interviewing, one of the main qualitative data techniques used by students, researchers, and public and private firms. The chapter will allow you to make an informed choice about different interview types and methods of interviewing and hardware, software and service options. We will also provide you with concrete strategies for preparing for the interview, recruiting, developing an interview schedule and conducting an interview. Finally, we discuss transcription options and provide you with concrete tools for managing interview data.
- **Chapter 5** is about focus groups. This chapter will provide you with the information you need to make an informed decision about the structure of your focus group, size, group composition and the number of focus groups you will need to answer your research question. We will also discuss important planning issues, including differentiating facilitator and note taker roles, considerations before selecting a venue, and materials needed.
Chapter 6 is about field research. Field research has a long history in a variety of disciplines; most notably anthropology but also sociology, labour studies, social or urban geography, organizational studies and social work. This chapter will outline strategies for conducting different non-participant and participant field research and writing high quality field notes.

Chapter 7 is about unobtrusive methods. Materials produced by individuals, groups or institutions are valuable unobtrusive sources that can be used as standalone or complementary sources of qualitative data. After we describe the types of unobtrusive data that are available, we then turn to detailing various methods of collecting unobtrusive data, including covert and non-covert, systematic and non-systematic and manifest and latent approaches.

Part III of this book provides you with the tools you will need to analyse your data and write up your research.

Chapter 8 is about using coding to conduct data analysis. The first part of the chapter provides you with practical tools for preparing your data for analysis, including how to develop a code-book. The second part of the chapter details the practice of coding, including pre-coding, and First Cycle and Second Cycle coding techniques.

Chapter 9 is about communicating qualitative research findings. In this chapter we systematically outline the expectations of different audiences (e.g., policy makers; multi-disciplinary versus single-disciplinary adjudication committees) and how researchers should approach writing a paper, a book proposal or grant application using qualitative data.

Now that we have outlined the spirit and intentions of our book, the next chapter takes you through the process of selecting a research topic and transforming that topic into a research problem. We specify data and theory driven sources of inspiration and guide you through the process of articulating your research problem.