Introduction to Qualitative Research Methodologies

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Course introduction
Qualitative research is used when researchers want to develop an in-depth understanding of a phenomenon or lived experience. Researchers who choose qualitative approaches want to go in-depth and develop new understandings. When designing qualitative studies, researchers choose a *methodology* to provide a framework and philosophical underpinning. This course introduces major qualitative methodologies so you will be better prepared to evaluate qualitative literature. By working through selected readings, videos, and case studies you will learn about the principles and practices involved with selecting qualitative methodologies and carrying out the study. You are encouraged to think through how and why one or more of these methodologies could fit your own research plans.

Learning outcomes
By the end of this course, you will be able to:
- Identify major qualitative methodologies and understand key principles
- Analyze ways methodologies influence other aspects of research design
- Explain how qualitative methodologies are used to study individuals, groups, organizations or societies
- Evaluate how qualitative methodologies align with research problems

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Course Outline

Lesson 1: What is Qualitative Research?

Key Concepts: qualitative research, qualitative inquiry

Overview:

When we need to grasp a complex topic sometimes a simplistic explanation is the best place to start. Once we have a broad understanding, we can delve into the nuances and finer points. Qualitative research is such a topic. Let's start by identifying characteristics:

> Qualitative inquiry aims to generate new understandings of the meaning people give to their lives and their worlds. This means qualitative researchers are typically focused on the participants' own descriptions of social and material circumstances, their lived experiences and histories, perspectives and insights. Based in commitment to these broad goals, qualitative researchers operate from the assumption that people construct their own realities and interpret the world in unique ways. (Salmons, 2016, p. 2)

What does it mean to *generate new understandings*? Qualitative research typically does not result in generalizable findings, instead, qualitative studies present in-depth stories and examples. Qualitative studies are designed to find or *generate participants' own descriptions*. The researcher might find descriptions in existing or contemporaneous writings or images, or in answers to questions. The researcher can find or generate a wide range of data types, including verbal responses, written materials, visuals or media. Put succinctly, we can define qualitative research as follows:

> Qualitative research is an umbrella term used to describe ways of studying perceptions, experiences or behaviors through their verbal or visual expressions, actions or writings.

To put this definition into practice, researchers choose methodologies to form and structure the study, and methods to conduct it. In this module, we will learn about methodologies and how to choose the one(s) that best fit the purpose of the study.

Core Reading:

Butler-Kisber, L. (2018). Introduction to qualitative inquiry. In Butler-Kisber, L. *Qualitative inquiry* (pp. 7-18). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781526417978

Denzin, N. & Ryan, K. (2007). Qualitative methodology (including focus groups). In Outhwaite, W., & Turner, S. P. *The SAGE handbook of social science methodology* (pp. 578-594). : SAGE Publications Ltd doi: 10.4135/9781848607958

Gephart Jr., R. (2018). Qualitative research as interpretive social science. In Cassell, C., Cunliffe, A. L., & Grandy, G. *The SAGE handbook of qualitative business and management research methods* (pp. 33-53). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781526430212

Mason, J. & Dale, A. (2011). Creative tensions in social research: questions of method. In Mason, J., & Dale, A. *Understanding social research: Thinking creatively about method* (pp. 1-26). London: SAGE Publications Ltd doi: 10.4135/9781446287972

Mills, J. & Birks, M. (2014). Introducing qualitative research. In Mills, J., & Birks, M. *Qualitative methodology* (pp. 2-16). 55 City Road, London: SAGE Publications, Inc. doi: 10.4135/9781473920163

Salmons, J. (2016). Qualitative approaches for research in a data-intensive world. In Salmons, J. *Doing qualitative research online* (pp. 1-14). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781473921955

Helpful Videos:

Lester Ph.D., J. N. (Academic). (2017). Jessica Nina Lester defines qualitative inquiry [Streaming video]. Retrieved from SAGE Research Methods.

Siu PhD, B. (Academic). (2020). An introduction to qualitative marketing research [Streaming video]. Retrieved from SAGE Research Methods.

Silverman Ph.D., D. (Academic). (2017). David Silverman discusses qualitative research [Streaming video]. Retrieved from SAGE Research Methods.

Discussion Questions and Learning Activities:

☐ Choose at least two resources to analyze. Compare and contrast the ideas and issues presented by each one. To what extent do the selected researchers agree or disagree? What is the basis for the perspectives expressed: references to other scholars and the literature, or their own research experiences?

☐ After reading the chapters and viewing one or more videos, create your own definition of qualitative research, and list at least three essential characteristics.

☐ What are the most important factors to consider when choosing to conduct a qualitative study?

Lesson 2: What are qualitative methodologies?

Key Concepts: research design, methodology, methods, units of analysis

Overview:

Qualitative research is organized into systems of thinking we call *methodologies.*

> Research methodology consists of the assumptions, postulates, rules, and methods—the blueprint or roadmap—that researchers employ to render their work open to analysis, critique, replication, repetition, and/or adaptation and to choose research methods (Given, 2008, p. 516).

We will contrast *methodology* with *methods*. Research methods are the tools or techniques which researchers use to carry out the study. They choose methods to collect, analyze, and interpret the data. Some methodologies encompass a set of methods, that is, there are common ways researchers working in that particular school of thought conduct their inquiries. Once you have determined the methodology, other decisions can be made about choosing theoretical frameworks, sampling participants or selecting extant materials, and aligning with methods for collecting and analyzing data.

Choosing a methodology is central to the qualitative research design or research proposal. The same question could be studied very differently, depending on the methodology. One way to differentiate them is by the unit of analysis, which describes the scope of the study. Some methodologies are generally used to questions of societal or global significance, while others look at deeply personal stories; some are generally used to study groups, and others for research about individuals. Within each major methodology you will discover multiple interpretations and approaches to allow for close alignment with the research problem and purpose.
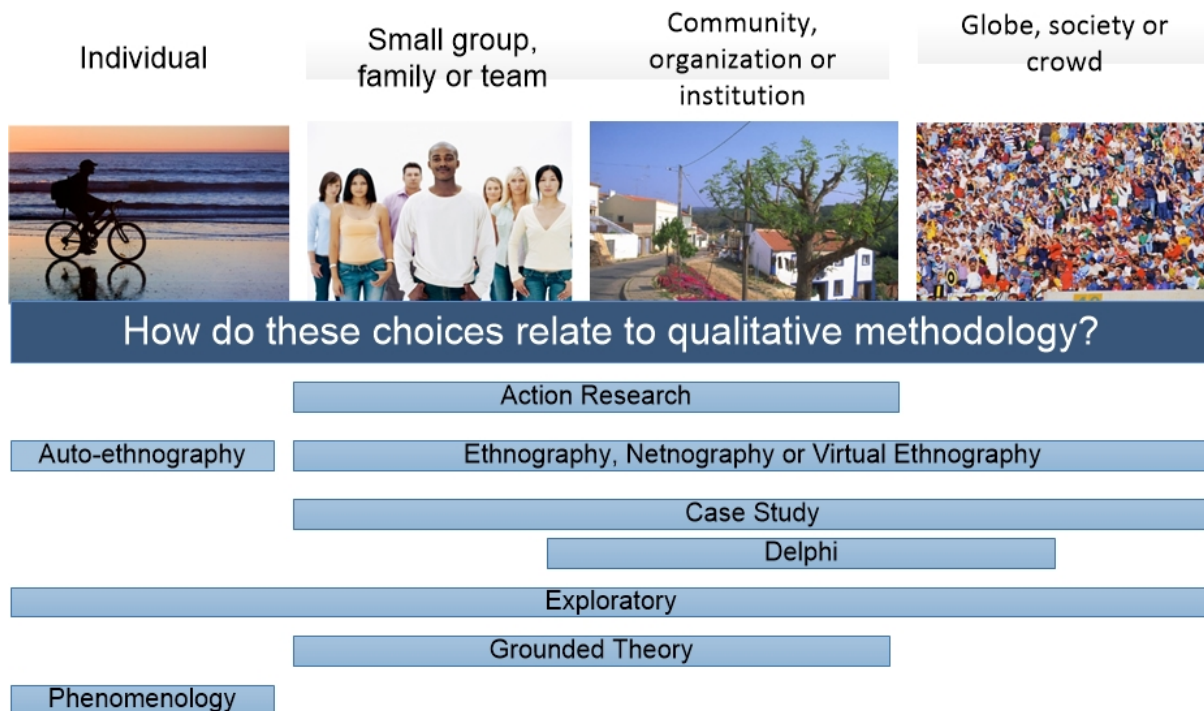
In this module you will explore action research, case study, ethnography, grounded theory, and phenomenology. By reviewing the writings or presentations of respected methodologists and reading examples in the literature, you can find the approach that will be the best fit to study the selected problem or question.

Core Reading:

Given, L. M. (2008). The SAGE encyclopedia of qualitative research methods (Vols. 1-0). Thousand Oaks, CA: SAGE Publications, Inc. doi: 10.4135/9781412963909

Gaudet, S. & Robert, D. (2018). Choosing an approach to guide methodological decisions. In Gaudet, S., & Robert, D. *A journey through qualitative research* (pp. 40-76). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781529716733

Mills, J. (2014). Methodology and methods. In Mills, J., & Birks, M. *Qualitative methodology* (pp. 31-47). 55 City Road, London: SAGE Publications, Inc. doi: 10.4135/9781473920163

Salmons, J. (2016). Choosing methodologies and methods for online studies. In Salmons, J. *Doing qualitative research online* (pp. 17-39). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781473921955

Supplementary Reading: Qualitative Research in Social Science Disciplines and Interests

Bourgeault, I., Dingwall, R., & De Vries, R. (2010). The SAGE handbook of qualitative methods in health research. London, : SAGE Publications Ltd doi: 10.4135/9781446268247

Cassell, C., Cunliffe, A. L., & Grandy, G. (2018). The SAGE handbook of qualitative business and management research methods. 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781526430236

DeLyser, D., Herbert, S., Aitken, S., Crang, M., & McDowell, L. (2010). The SAGE handbook of qualitative geography. 55 City Road, London: SAGE Publications, Inc. doi: 10.4135/9780857021090

Eriksson, P., & Kovalainen, A. (2008). Introducing Qualitative Methods: Qualitative methods in business research. London, : SAGE Publications Ltd doi: 10.4135/9780857028044

Lichtman, M. (2011). Understanding and evaluating qualitative educational research. Thousand Oaks, CA: SAGE Publications, Inc. doi: 10.4135/9781483349435

Marvasti, A. B. (2004). Introducing Qualitative Methods: Qualitative research in sociology. London: SAGE Publications, Ltd doi: 10.4135/9781849209700

McLeod, J. (2001). Qualitative research in counselling and psychotherapy. London: SAGE Publications Ltd doi: 10.4135/9781849209663

Shaw, I., & Holland, S. (2014). Doing qualitative research in social work. 55 City Road, London: SAGE Publications, Ltd doi: 10.4135/9781473906006

Willig, C., & Rogers, W. (2017). *The SAGE Handbook of qualitative research in psychology*. London, : SAGE Publications Ltd doi: 10.4135/9781526405555

Helpful Videos

Durdella, N. (Academic). (2018). Key skills in writing a qualitative research proposal [Streaming video]. Retrieved from SAGE Research Methods. See Segment 4.

Discussion Questions and Learning Activities:

☐ How would you differentiate the choice of methodologies needed for studying individuals, small groups, communities, organizations, or societal issues?

☐ What kinds of qualitative research methodologies are used in your discipline? Select a book from the list of supplementary resources from SAGE Research Methods, or other resources about qualitative research in your field. Read the introduction, table of contents, and first chapter. What methodologies are featured? How are qualitative methodologies described in the context of the kinds of questions and problems relevant to your discipline?

☐ Using your academic library or Google Scholar, locate at least three recent qualitative articles, theses, or dissertations relevant to your research interests. What methodologies are used in these studies? What rationales did the researchers provide to explain their reasoning for selecting the methodology?

Lesson 3: What is Action Research?

Key Concepts: social change, community, researcher-participant collaboration

Overview:

The researcher stands apart in some kinds of research, but that is not the case in action research. In action research the whole purpose is involvement of the researcher in problem-solving or developing strategies that can be used to make things better. Action research typically involves studies of groups, organizations, or communities.

SAGE Research Methods defines action research as:

> A type of applied research designed to find the most effective way to bring about a desired social change or to solve a practical problem, usually in collaboration with those being researched.
>
> Or
>
> An approach to action research which aims to transcend the boundaries between research and activism in order to produce knowledge and action that is directly useful to people, and to empower people through the process of constructing and using their own knowledge.

In "participatory action research," the researcher, participants, and others in the organization or community are engaged a collaborative effort. In such studies the term co-researcher is often used to indicate shared decision-making.

> The term *participatory action research* (PAR) suggests that PAR has three different components at the very least. It involves research (i.e., the organized study of a certain subject), it is participatory or collaborative in its method, and the research highlights action or some change by its process or outcome (Thyer, 2010, p. 449).

By its nature, this type of research requires an extensive commitment of time, and buy-in from all involved. Researchers, together with co-researchers, might choose a variety of methods for collecting data, including participant observation, interviews or focus groups, creative or arts-based methods. They draw on historical or contemporary records to better understand the background of the problem. PAR can be qualitative, or use surveys or other quantitative data in a mixed methods study.

Core reading:

Blum, E., Heinonen, T. & White, J. (2010). Participatory action research studies. In Thyer, B. *The handbook of social work research methods* (pp. 449-466). 55 City Road, London: SAGE Publications, Inc. doi: 10.4135/9781544364902

Coghlan, D. & Shani, A. (2015). Developing the practice of leading change through insider action research: a dynamic capability perspective. In Bradbury, H. *The SAGE Handbook of action research* (pp. 47-54). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781473921290

Coghlan, D. & Shani, A. (2018). Introducing action research. In Coghlan, D., & Shani, A. *Mastering Business Research Methods: Conducting action research for business and management students* (pp. 1-26). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781529716566

DeJonckheere, M.,Vaughn, L. M., & Bruck, D. (2017). Youth-led participatory action research: A collaborative methodology for health,education, and social change**.** *SAGE Research Methods Cases.* doi:10.4135/9781473956032

Dick, B. (2014). Action research. In Mills, J., & Birks, M. *Qualitative methodology* (pp. 50-66). 55 City Road, London: SAGE Publications, Inc. doi: 10.4135/9781473920163

Lykes, M. & Hershberg, R. (2012). Participatory action research and feminisms: social inequalities and transformative praxis. In Hesse-Biber, S. N. *Handbook of feminist research: Theory and praxis* (pp. 331-367). Thousand Oaks, CA: SAGE Publications, Inc. doi: 10.4135/9781483384740

Noffke, S. (2009). Revisiting the professional, personal, and political dimensions of action research. In Noffke, S. E., & Somekh, B. *The SAGE handbook of educational action research* (pp. 6-24). London: SAGE Publications Ltd doi: 10.4135/9780857021021

Research Cases:

Bergmans, A. (2018). Putting action research into practice: Co-designing a participatory process for negotiating the siting of a radioactive waste repository. *SAGE Research Methods Cases.* doi:10.4135/9781526446916

DeJonckheere, M., Vaughn, L. M., & Bruck, D. (2017). Youth-led participatory action research: A collaborative methodology for health, education, and social change. *SAGE Research Methods Cases.* doi:10.4135/9781473956032

Heard-Lauréote, K., Field, M., & Waterman, A. (2019). Using participatory action research to explore civil society organizations. *SAGE Research Methods Cases.* doi:10.4135/9781526479624

Wamba, N. (2014). Participatory action research for school improvement: The Kwithu Project. *SAGE Research Methods Cases.* doi:10.4135/978144627305014528626

Helpful videos:

Ivankova Ph.D., N. (Academic). (2017). Nataliya Ivankova defines action research [Streaming video]. Retrieved from SAGE Research Methods.

Spencer Ph.D., G. (Academic). (2017). Grace Spencer defines participatory action research [Streaming video]. Retrieved from SAGE Research Methods.

Gray, D. E. (Academic). (2017). Top tips: action research [Streaming video]. Retrieved from SAGE Research Methods.

Discussion Questions and Learning Activities:

☐ After developing a foundational understanding of participatory action research by reading at least two of the core reading options and watching one video, study the below case:

DeJonckheere, M., Vaughn, L. M., & Bruck, D. (2017). Youth-led participatory action research: A collaborative methodology for health, education, and social change. *SAGE Research Methods Cases.* doi:10.4135/9781473956032

- The case by DeJonckheere and colleagues is based on two studies that used a qualitative participatory action research methodology, with youth as research partners. Do you think they made the right choice of methodology? Why or why not? What are the strengths and weaknesses of their implementation of PAR?
- Explain the basic principles of participatory action research as described in the readings and videos. Which principles did DeJonckheere and colleagues adhere to in their research? Are there steps they could have taken to strengthen the methodological foundations of the study?
- Youth-led PAR projects are often collaborations among youth, community organizations, community members, and academic researchers. Describe some of the benefits and challenges each of these partners may experience in a collaborative research project.

☐ Using your academic library or Google Scholar, locate two recent articles relevant to your research interests that used a case study methodology. Read the introduction and methods sections. How do the researchers describe the e case study approach in the context of their research? What was their rationale for choosing case study? To what extent did their descriptions align with the principles discussed in the readings and videos from this lesson?

☐ How could you use action research or participatory action research methodology to study a problem in your field or discipline? Who would you need to involve in the project? Why would you choose or reject action research or participatory action research as a methodology?

Lesson 4: What is Case Study Research?

Key Concepts: case study, bounded case

Overview:

Researchers who want to study different dimensions of an issue in depth, within its real-world context, could choose case study research. A case can be a concrete entity such as a person, group, organization, or community. A policy, practice, or event could be studied as a case. A case could also be abstract, a way to study ideas, arguments, or propositions. Studies can include one or more cases.

Robert Yin (2018) points to three types of case studies:
- An explanatory case study is designed to explain how or why some condition came to be, or why a sequence of events occurred.
- An exploratory case study is designed to identify research questions to be used in a subsequent study.

- A descriptive case study is designed to describe a phenomenon in context.

When researchers select in case, they determine what will be included and what will be excluded from the study. This is called *bounding the cas*e. Researchers could decide to bound the case by time frame, geographic location, or other parameters.

Case study methodology invites researchers to look at a phenomenon from different perspectives. To do so, case study designs use multiple forms of data. As such, a case study can be qualitative, quantitative, or use mixed methods. Here we will focus on qualitative case studies.

Core Reading:

Emmel, N. (2013). Purposefully choosing cases. In Emmel, N. *Sampling and choosing cases in qualitative research: A realist approach* (pp. 107-120). London: SAGE Publications Ltd doi: 10.4135/9781473913882

Mills, A. J., Durepos, G., & Wiebe, E. (2010). *Encyclopedia of case study research* (Vols. 1-0). Thousand Oaks, CA: SAGE Publications, Inc. doi: 10.4135/9781412957397 See: "Comparing the Case Study with Other Methodologies"

Morgan, D. L. & Morgan, R. K. (2009). Why single-case research methods?. In Morgan, D. L., & Morgan, R. K. *Single-case research methods for the behavioral and health sciences* (pp. 1-14). Thousand Oaks, CA: SAGE Publications, Inc. doi: 10.4135/9781483329697

Morgan, D. L. & Morgan, R. K. (2009). Comparing group and single-case designs. In Morgan, D. L., & Morgan, R. K. *Single-case research methods for the behavioral and health sciences* (pp. 15-40). Thousand Oaks, CA: SAGE Publications, Inc. doi: 10.4135/9781483329697

Stewart, A. (2014). Case study. In Mills, J., & Birks, M. *Qualitative methodology* (pp. 145-160). 55 City Road, London: SAGE Publications, Inc. doi: 10.4135/9781473920163

Research Cases:

Cross, Z. L. (2020). An exploration of desistance from youth offending using qualitative methods: Interviews and focus groups. *SAGE Research Methods Cases.* doi:10.4135/9781529716757

Greer, T. (2014). A Case Study of Three Working Mothers: Using Interviews and Activity Logs for Work–Family Research. *SAGE Research Methods Cases.* doi:10.4135/97814627305014537194

Hyde, A. (2017). Yoga at the promise program: A feminist qualitative case study of school-based yoga. *SAGE Research Methods Cases.* doi:10.4135/9781526402912

Khambari, M. (2015). The role of social, cultural, and historical practices on teachers' use of interactive whiteboard: A qualitative case study. *SAGE Research Methods Cases.* doi:10.4135/97814627305014553774

Pauluzzo, R. (2020). Applying yin yang wisdom in western organizational settings: Using interviews, documents, and field observations for cross-cultural research. *SAGE Research Methods Cases.* doi:10.4135/9781529704136

Takano, K. (2019). [Cross-cultural research obstacles: A case study of a Japanese industry leader](). *SAGE Research Methods Cases.* doi:10.4135/9781526480736

Helpful Videos:

Gray, D. E. (Academic). (2017). [Top tips: case studies]() [Streaming video]. Retrieved from SAGE Research Methods.

Landman Ph.D., T. (Academic). (2017). [An introduction to case studies]() [Streaming video]. Retrieved from SAGE Research Methods.

Discussion Questions and Learning Activities:

- ☐ Choose two case studies. Compare and contrast them in regard to:
  - ☐ Rationale for selecting the methodology or research approach
  - ☐ Description of how they "bounded" the case
  - ☐ Explanation of whether they used single or multiple-cases
  - ☐ Description of how they conducted the study
  - ☐ Ways they addressed any problems or obstacles

- ☐ What are the strengths of each study?

- ☐ If these researchers asked for your advice, what would you suggest to help them improve the research design or process?

- ☐ Using your academic library or Google Scholar, locate two recent articles relevant to your research interests that used a case study methodology. Read the introduction and methods sections. How do the researchers describe the case study approach in the context of their research? What was their rationale for choosing case study? To what extent did their descriptions align with the principles discussed in the readings and videos from this lesson?

How could you use case research methodology to study a problem in your field or discipline? Would you choose a single or multiple case design? Why would you choose or reject case research as a methodology?

Lesson 5: What is Ethnographic Research?

Key Concepts: culture, community, ethnography

Overview:

Ethnographers are interested in people and cultures. Ethnographers are interested in how, given the cultural contexts, people interact in their natural settings. In today's world, ethnographic researchers look at cultures online and in real world.

SAGE Research Methods defines ethnography as:

> Ethnography involves the production of highly detailed accounts of how people in a social setting lead their lives, based on systematic and long-term observation of, and discussion with, those within the setting.

To produce these detailed accounts, ethnographers choose immersive methods. "Ethnographers value the idea of 'walking a mile in the shoes' of others and attempt to gain insight by being in the same social space as the subjects of their research" (Madden, 2017, p. 1). Methods often used by ethnographers to collect data include observation or participant observation in fieldwork. Ethnographers collect diverse types of data in addition to records of verbal exchanges with participants, including visual images or media, written documents, or artifacts. These methods allow researchers to be immersed in the research setting so they can see what is taking place and talk with people about experiences.

While long associated with sociology and anthropology, ethnographic methodologies are now used in business, education, and other fields.

Core reading:

Atkinson, P. (2017). Defining social reality. In Atkinson, P. *Thinking ethnographically* (pp. 20-42). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781473982741

Curtis, B. & Curtis, C. (2011). Ethnographic research – studying groups in natural settings. In Curtis, B., & Curtis, C. *Social research* (pp. 78-98). 55 City Road, London: SAGE Publications, Inc. doi: 10.4135/9781526435415

Dutta, U. (2014). Critical ethnography. In Mills, J., & Birks, M. *Qualitative methodology* (pp. 89-106). 55 City Road, London: SAGE Publications, Inc. doi: 10.4135/9781473920163

Emerson, R., Fretz, R. & Shaw, L. (2001). Participant observation and fieldnotes. In Atkinson, P., Coffey, A., Delamont, S., Lofland, J., & Lofland, L. *Handbook of ethnography* (pp. 352-368). : SAGE Publications Ltd doi: 10.4135/9781848608337

Gobo, G. (2008). Part One: The Methodology in *Introducing Qualitative Methods: Doing ethnography*. London, SAGE Publications Ltd doi: 10.4135/9780857028976

Hine, C. (2019). Ethnographies in Online Environments. In P. Atkinson, S. Delamont, A. Cernat, J.W. Sakshaug, & R.A. Williams (Eds.), *SAGE Research Methods Foundations.* doi: 10.4135/9781526421036784565

Neyland, D. (2008). Sensibility one: ethnographic strategy. In Neyland, D. *Organizational ethnography* (pp. 26-40). : SAGE Publications Ltd doi: 10.4135/9781849209526

Madden, R. (2017). Introduction. In Madden, R. *Being ethnographic* (pp. 1-12). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781529716689

Research Cases:

Abarbanell, L. (2020). Using ethnography to study indigenous women's agency in reproductive health care. *SAGE Research Methods Cases.* doi:10.4135/9781529744606

Kervin, L., Mantei, J., & Lipscombe, K. (2017). The intricacies of classroom-based ethnography. *SAGE Research Methods Cases.* doi:10.4135/9781473969766

McCosker, A. (2014). Negotiating illness bloggers' expressive worlds: Adapting digital ethnography. *SAGE Research Methods Cases.* doi:10.4135/978144627305014529501

Spradley, R. (2019). Physically intensive participant observation: Conducting ethnographic fieldwork with emergency responders. *SAGE Research Methods Cases.* doi:10.4135/9781526483911

Helpful videos:

Chapman, M. (Practitioner). (2017). Applied ethnography in product design: IDEO [Streaming video]. Retrieved from SAGE Research Methods.

Gray, D. E. (Academic). (2017). Top tips: ethnography [Streaming video]. Retrieved from SAGE Research Methods.

Heyes, K. (Academic). (2018). Researching online community support forums using virtual ethnography [Streaming video]. Retrieved from SAGE Research Methods.

Henry Ph.D., M. (Academic). (2015). Qualitative research and ethnography [Streaming video]. Retrieved from SAGE Research Methods.

Jones Ph.D., J. (Academic). (2017). Researching multiracial identity using ethnographic methods [Streaming video]. Retrieved from SAGE Research Methods.

Discussion Questions and Learning Activities:

☐ Choose two case studies. Compare and contrast them in regard to:
    ☐ Rationale for selecting the methodology or research approach
    ☐ Explanation of the cultural issues or experiences they studied
    ☐ Description of how they conducted the study, including relationships with individual participants or organizations
    ☐ Ways they addressed any problems or obstacles
☐ What are the strengths of each study?

☐ If these researchers asked for your advice, what would you suggest to help them improve the research design or process?

☐ Using your academic library or Google Scholar, locate two recent articles relevant to your research interests that used an ethnographic methodology. Read the introduction and methods sections. How do the researchers describe the ethnographic approach in the context of their

research? What was their rationale for choosing ethnography? To what extent did their descriptions align with the principles discussed in the readings and videos from this lesson?

☐ How could you use ethnography to study a problem in your field or discipline? What kind of ethnography would you select? Why would you choose or reject ethnography as a methodology?

Lesson 6: What is Exploratory Qualitative Research?

Key Concepts: exploratory research

Overview:

Not all qualitative research fits neatly into an existing methodology. Sometimes the purpose is to study a new problem or a sensitive topic. Sometimes the researcher wants to investigate a question, population, or phenomenon in a preliminary way before designing a full-scale study. Stebbins pointed out that researchers "explore when they possess little or no scientific knowledge about the group, process, activity, or situation they want to examine but nevertheless have reason to believe contains elements worth discovering"(Stebbins, 2008, p. 327).

Jupp defined exploratory research as:

> "a methodological approach that is primarily concerned with discovery and with generating or building theory. In a pure sense, all research is exploratory. In the social sciences exploratory research is wedded to the notion of exploration and the researcher as explorer. In this context exploration might be thought of as a perspective, 'a state of mind, a special personal orientation' (Stebbins, 2001: 30) toward approaching and carrying out social inquiry." (Jupp, 2006, p. 111)

In such situations the researcher might choose to design an exploratory study. While we are focusing on qualitative exploratory methodologies, mixed and quantitative research can also take an exploratory turn.

Core Reading:

Stebbins, R. A. (2001). *Qualitative Research Methods: Exploratory research in the social sciences*. Thousand Oaks, CA: SAGE Publications, Inc. doi: 10.4135/9781412984249
See Chapter 1, "What is Exploration?" and Chapter 2, "Exploring"

Research Cases:

Bindah, E. V. (2019). Adoption of snowball sampling technique in an exploratory study of disabled entrepreneurship. *SAGE Research Methods Cases.* doi:10.4135/9781526487438

Shakespear, H. (2019). Challenges and opportunities of conducting exploratory qualitative research on politically sensitive topics: Understanding the politics of natural resource governance in Zimbabwe. *SAGE Research Methods Cases.* doi:10.4135/9781526486714

van der Hoorn, B. (2019). [Studying the "lived experience" of project managing using photo elicitation and semi-structured interviews](#). *SAGE Research Methods Cases.* doi:10.4135/9781526464668

Wykes, E. (2018). [Semi-structured interviews: Exploring the racialization of names within the United Kingdom](#). *SAGE Research Methods Cases.* doi:10.4135/9781526458780

Helpful videos:

Marshall Ph.D., C., & Rossman Ph.D., G. B. (Academic). (2011). [When should a researcher choose a qualitative approach?](#) [Streaming video]. Retrieved from SAGE Research Methods.

Sun PhD, Q. (Academic). (2020). [An experiential class project to show the market research process](#) [Streaming video]. Retrieved from SAGE Research Methods.

Discussion Questions and Learning Activities:

☐ View the videos. Do the researchers make a compelling case for using exploratory methodologies? Why?

☐ Choose two case studies. Compare and contrast them in regard to:
  ☐ Rationale for selecting the methodology or research approach
  ☐ Explanation of the exploration they took and why
  ☐ Description of how they conducted the study
  ☐ Ways they addressed any problems or obstacles
  ☐ Next steps, such as additional research, based on what they discovered

☐ What are the strengths of each study? If these researchers asked for your advice, what would you suggest to help them improve the research design or process?

☐ Using your academic library or Google Scholar, locate two recent articles relevant to your research interests that used an exploratory methodology. Read the introduction and methods sections. How do the researchers describe exploratory methodology in the context of their research? What was their rationale for choosing exploratory methodology? To what extent did their descriptions align with the principles discussed in the readings and videos from this lesson?

☐ How could you use an exploratory methodology to study a problem in your field or discipline? Why would you choose or reject an exploratory methodology?

Lesson 7: What is Grounded Theory?

Key Concepts: theory, constructs, theoretical descriptions

Overview:

While many qualitative researchers use theories to frame their studies, grounded theory researchers try to develop new theories. These researchers see limitations in existing theories, and design research to generate new theoretical constructs and principles.

SAGE Research Methods defines *grounded theory* as:

> An approach developed by the American sociologists Barney Glaser and Anselm Strauss, grounded theory builds systematic theoretical statements inductively from the coding and analysis of observational data, and the subsequent development and refinement of conceptual categories which are tested and re-tested in further data collection. Subsequently, Glaser and Strauss diverged in their understanding of the method.

Grounded theory studies can be conducted with qualitative, quantitative, or mixed methods approaches. Dr. Kathy Charmaz is a methodologist who advanced the field of qualitative grounded theory. Her approaches are used by researchers who want to generate theoretical concepts or models, even if they are not trying to create fully developed theories. Qualitative grounded theory researchers use a wide range of qualitative methods to collect data, often centering on a series of interviews with participants.

Core reading:

Bryant, A., Bryant, A., Bryant, A., Casper, M., Charmaz, K., … & Wittgenstein, L. (2007). [Introduction: grounded theory research: methods and practices](). In Bryant, A., & Charmaz, K. *The SAGE handbook of grounded theory* (pp. 1-28). : SAGE Publications Ltd doi: 10.4135/9781848607941

Mills, J., Birks, M. & Hoare, K. (2014). [Grounded theory](). In Mills, J., & Birks, M. *Qualitative methodology* (pp. 107-122). 55 City Road, London: SAGE Publications, Inc. doi: 10.4135/9781473920163

Urquhart, C. (2019). [Grounded theory's best kept secret: the ability to build theory](). In Bryant, A., & Charmaz, K. *The SAGE Handbook of Current Developments in Grounded Theory* (pp. 89-106). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781526485656

Urquhart, C. (2013). [Building the theory](). In Urquhart, C. *Grounded theory for qualitative research* (pp. 106-128). 55 City Road, London: SAGE Publications, Ltd doi: 10.4135/9781526402196

Research Cases:

Catolico, O. (2017). [A grounded theory study: Displacement, migration, and resettlement of cambodian refugee women](). *SAGE Research Methods Cases.* doi:10.4135/9781526423948

Curtis, K. (2017). [Using iterative cycles of discovery within a glaserian grounded theory of socialization in compassion](). *SAGE Research Methods Cases.* doi:10.4135/9781526411471

Lehane, O. (2019). [A journey through classic grounded theory: Exploring the work of grassroots violence prevention practitioners](). *SAGE Research Methods Cases.* doi:10.4135/9781526477224

Malik, G., McKenna, L., & Griffiths, D. (2020). [Applying grounded theory methods to investigate evidence-based practice integration into undergraduate nurse education](). *SAGE Research Methods Cases.* doi:10.4135/9781529744194

Schiemer, M. (2017). [Doing research on education for children with disabilities in Ethiopia using grounded theory](). *SAGE Research Methods Cases.* doi:10.4135/9781526419040

Helpful videos:

Charmaz Ph.D., K. (Academic). (2017). [An introduction to grounded theory]() [Streaming video]. Retrieved from SAGE Research Methods.

Additional SAGE Research Methods Resources:

Mihas, P., & Odum Institute. (2019). [Learn to use Charmazian grounded theory with data from the southern oral history program](). London, United Kingdom: SAGE Publications, Ltd. doi: 10.4135/9781526494894

Discussion Questions and Learning Activities:

- Choose two case studies. Compare and contrast them in regard to:
    - Rationale for selecting the methodology or research approach
    - Description of the theory, theoretical constructs, or models they wanted to generate from the study
    - Description of how they conducted the study
    - Explanation of whether or not they were successful at generating new theory
    - Ways they addressed any problems or obstacles.

- What are the strengths of each study?

- If these researchers asked for your advice, what would you suggest to help them improve the research design or process?

- View the video with Dr. Kathy Charmaz, then try working with the Mihas, P., & Odum Institute dataset. How would you describe your experience? After trying to analyze data from a grounded theory perspective are you more or less interested in conducting research with this approach? Why?

- Using your academic library or Google Scholar, locate two recent articles relevant to your research interests that used a grounded theory methodology. Read the introduction and methods sections. How do the researchers describe grounded theory in the context of their research? What was their rationale for choosing grounded theory? To what extent did their descriptions align with the principles discussed in the readings and videos from this lesson?

- How could you use grounded theory to study a problem in your field or discipline? What kinds of theoretical descriptions or models would you try to generate? Why would you choose or reject grounded theory as a methodology?

Lesson 8: What is Phenomenological Research?

Key Concepts: perceptions, consciousness

Overview:

Phenomenological research explores participants' perceptions and experiences of a phenomenon. So rather than study the phenomenon directly, the researcher using this approach tries to learn about the ways individuals understand and know the phenomenon.

SAGE Research Methods defines *phenomenology* as:

> the descriptive study of how things appear to consciousness, often with the purpose of identifying the essential structures that characterise experience of the world.

When designing a study, the researcher must first define the phenomenon very clearly, and determine which characteristics or aspects they want to learn about from participants' perspectives. Researchers study participants who have shared or have a common exposure to the phenomenon, typically through a series of in-depth interviews. Based on a multi-stage analytic process, they construct a nuanced description of the essence of their experience. They discuss the "lived experience" of the phenomenon.

Phenomenology originated in fields associated with psychology, and early writings are very philosophical. Novice researchers can find these writings to be somewhat intimidating. However, researchers from across disciplines have adopted phenomenological approaches and have published more user-friendly texts and examples.

Core Reading:
Antoniadou, M., & Crowder, M. (2019). The power of phenomenology in examining how organizational members give meaning to emotions. *SAGE Research Methods Cases.* doi:10.4135/9781526495594

Butler-Kisber, L. (2018). Phenomenological inquiry. In Butler-Kisber, L. *Qualitative inquiry* (pp. 60-70). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781526417978

Bloor, M. & Wood, F. (2006). Phenomenological methods. In Bloor, M., & Wood, F. *Keywords in qualitative methods*(pp. 129-130). London: SAGE Publications Ltd doi: 10.4135/9781849209403

Eberle, T. (2014). Phenomenology as a research method. In Flick, U. *The SAGE handbook of qualitative data analysis* (pp. 184-202). London: SAGE Publications Ltd doi: 10.4135/9781446282243

Giorgi, A., Giorgi, B. & Morley, J. (2017). The descriptive phenomenological psychological method. In Willig, C., & Rogers, W. *The SAGE Handbook of qualitative research in psychology* (pp. 176-192). London: SAGE Publications Ltd doi: 10.4135/9781526405555

Howell, K. E. (2013). Aspects of phenomenology. In Howell, K. E. *An introduction to the philosophy of methodology* (pp. 55-74). London: SAGE Publications Ltd doi: 10.4135/9781473957633

Spiers, J., & Smith, J. A. (2019). Interpretative Phenomenological Analysis. In P. Atkinson, S. Delamont, A. Cernat, J.W. Sakshaug, & R.A. Williams (Eds.), *SAGE Research Methods Foundations.* doi: 10.4135/9781526421036813346

Usher, K. & Jackson, D. (2014). Phenomenology. In Mills, J., & Birks, M. *Qualitative methodology* (pp. 181-198). 55 City Road, London: SAGE Publications, Inc. doi: 10.4135/9781473920163

Research Cases:

Antoniadou, M., & Crowder, M. (2019). The power of phenomenology in examining how organizational members give meaning to emotions. *SAGE Research Methods Cases.* doi:10.4135/9781526495594

Ardley, B., & Taylor, N. (2019). Perceptions of business advisers in small manufacturing companies: The phenomenological interview as a research method. *SAGE Research Methods Cases.*doi:10.4135/9781526494665

Moustakas, C. (1994). Transcendental phenomenology: conceptual framework. In Moustakas, C. *Phenomenological research methods* (pp. 25-42). Thousand Oaks, CA: SAGE Publications, Inc. doi: 10.4135/9781412995658

McGovern, J. (2017). Capturing the lived experience: Getting started with interpretive phenomenology research. *SAGE Research Methods Cases.* doi:10.4135/9781526405418

Owino, G. (2020). A triangulated phenomenological study in social definitions of HIV: Initial reactions, acceptance, and coping strategies. *SAGE Research Methods Cases.* doi:10.4135/9781529741506

Helpful videos:

Keenan, B. (Academic). (2018). Researching Nurse Educators: Lessons Learned From a Phenomenological Approach [Streaming video]. Retrieved from SAGE Research Methods.

Discussion Questions and Learning Activities:

- ☐ There are many interpretations of phenomenology. Select three of the readings, and look for the ways each author describes their principles, priorities, and research perspectives. Use what you learn to articulate your own definition and statement or principles.

- ☐ Choose two case studies. Compare and contrast them in regard to:
  - ☐ Rationale for selecting the methodology or research approach
  - ☐ Description of the phenomenon
  - ☐ Explanation of the aspects of the lived experience they wanted to understand and why
  - ☐ Description of how they conducted the study
  - ☐ Ways they addressed any problems or obstacles

- ☐ What are the strengths of each study?

☐ If these researchers asked for your advice, what would you suggest to help them improve the research design or process?

☐ Using your academic library or Google Scholar, locate two recent articles relevant to your research interests that used a phenomenological methodology. Read the introduction and methods sections. How do the researchers describe phenomenology in the context of their research? What was their rationale for choosing phenomenology? To what extent did their descriptions align with the principles discussed in the readings and videos from this lesson?

☐ How could you use phenomenology to study a problem in your field or discipline? Whose perceptions would be relevant to a study in your field? Why would you choose or reject phenomenology as a methodology?

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Madden, R. (2017). Introduction *Being ethnographic: A guide to the theory and practice of ethnography* (Second ed.). 55 City Road, London: SAGE Publications Ltd.

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