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
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:


Helpful Videos:


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?
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:


Supplementary Reading: Qualitative Research in Social Science Disciplines and Interests


**Helpful Videos**


**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 in 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:


Research Cases:


Helpful videos:


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:


- 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 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 case. 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:


Research Cases:


Helpful Videos:


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:


Research Cases:


Helpful videos:


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:**


See Chapter 1, “What is Exploration?” and Chapter 2, “Exploring”

**Research Cases:**


**Helpful videos:**


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:**


**Research Cases:**


**Helpful videos:**


**Additional SAGE Research Methods Resources:**


**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:**


Research Cases:


Helpful videos:


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?

References


