

What qualitative methods can I use to collect data?

Before deciding what method you want to adopt, you need to establish two things: what you want to know, and what resources you have available.

In theory, you need to determine what you want to know before you select your methodology. Too often, research projects are determined by the methods that seem most accessible, limiting the scope of the research. Realistically, however, there is no point saying that you want to do interviews with the last five Prime Ministers if you can't get in touch with them. You need to consider both what you want to know and what is feasible for you to achieve with your resources as you determine the focus and methods of your project.

The resources you have might include access to particular groups of people, or particular information, which you might have through work or placements. It also includes time. Some methodologies are more time-consuming than others, although this can also make them more rewarding.

This guide starts off with data collection techniques, i.e. what you actually do to get your information. The second section relates to research strategies, i.e. the bigger picture within which the data collection fits.

Qualitative data collection techniques.

Interviews:

Interviews are the most common qualitative method. You can do them individually or in a group (focus group), face to face or over the phone or web, and they can be more or less structured. They can be anywhere on a continuum from structured (always the same questions), to semi-structured (a question guide but with some flexibility), or unstructured (totally open-ended, with only a rough aim or brief list of topics). The strength of interviews is that you get direct information from the people who know most about it. That, by the way, is the key point about interviews: you need to work out who actually knows about your topic and how you are going to contact them.

Before conducting the interview, we need an 'interview schedule' of questions, which are set by the interviewer that can be extended further through the answers from the interviewee. An interview is more than a conversation; it is a face-to-face discussion with people. Interviews provide in-depth data. They allow a relationship to develop where people's thoughts, ideas, feelings, emotions, attitudes and responses can be captured and put into context.

Before beginning the interview, it is important to adhere to the appropriate ethical guidelines and obtain 'informed consent' from the interviewee via a signed form stating that the interviewee understands the purpose of the interview. Foremost, the data will be used for research material thereafter. The informed consent must remain continuous at the start to the end of the research. The interviews can be either semi-structured open-ended, unstructured, one-to-one or in groups.

Common issues are that people don't always tell you the full and absolute truth; sometimes because they want to present themselves in a positive way; sometimes because they might mis-remember information or never have thought about the

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topic; sometimes because people aren't consciously aware of their own thought processes. Remember that your information is always filtered through their perceptions of reality. If you're dealing with a touchy or a sensitive topic, or an issue which people might not think about consciously, asking directly may not get you what you need to know. There are ways around this, such as using scenarios, prompts and photographs, to kick start discussion, and well-designed questions can get around them. But doing interviews really well is NOT the easy option.

During the interview process, pay attention to your conduct and ensure it is appropriate and professional. Of course, this will depend on the purpose and type of interview to be conducted. Finally, give consideration to how the interview will be recorded: notes or audio recording. If using the latter, it is best to use a digital recorder and have in place the equipment ready for transcribing quite soon afterwards.

Consider using interviews if:

- You have access to the right people (i.e. people with direct, personal experience of your topic).
- Your topic is not sensitive and is something that people are aware of or think about consciously OR you can design questions in such a way to reveal the unconscious information or get around the sensitivity.
- You want to collect deep, rich information from a few individuals.

Survey:

People often think of questionnaires as being a method for quantitative data collection, but this depends on the type of question. If you write open-ended questions ('how', 'why', 'describe', 'tell me about'), then questionnaires can be a good qualitative method as well. Its structure and purpose will depend on the research to be conducted. The questionnaire must be planned and designed carefully to collect the information for data analysis thereafter. It will consist of a list of questions, which can be either 'open' or 'closed'. During the designing, consider the costs, its production, its purpose, organisation, schedule, length, permission, the ethics, its construction, wording and the audience (Denscombe, 2007: Chapter 9).

Collecting qualitative survey data can take time, and bear in mind that it will take participants longer to write a sentence than to tick a box, so you may find it more challenging to recruit people to your study. Surveys can be administered through paper, online tools, phone, and through face to face (you can go up to people and ask them the questions and fill it out yourself). The latter is often a more effective way of making sure people complete the whole survey, although it is more time-consuming for you.

Common issues with surveys are low response rates, often due to research fatigue (we all get asked to fill out so many surveys that we get tired of it), inaccurate responses due to misunderstanding the question, and simplistic answers (i.e. one-word answers for a 'why' question). Similarly, to the interview issues, remember that people may not be entirely truthful in their responses, for a whole range of reasons. In your analysis, remember that you are collecting information about people's perceptions, not 'reality'.

Consider this if:

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- You want to collect information about opinions, perspectives or views.
- You want to get information from a wide range of people but don't need depth.
- You can contact or access people with direct, personal experience or opinions about your topic.

Observations:

Observations are basically when you watch people engaging in a particular behaviour or in a particular context, and note what you see. They can be more or less structured, depending on what you want to know and what previous research has been done. Observations are common in educational research, as well as market research. For example, you might do a classroom observation where you watch to see what children do in response to the teacher's instructions.

This could be more structured, where you pre-determine the categories of behaviour that you are interested in (e.g. following instruction, daydreaming, disruption, etc), or it could be less structured where you note down individual children's responses. A similar process could be followed in a clothes shop, observing how shoppers decide which item to try on.

There are two types of observation research: (quantitative research) 'systematic observation' - the study of interactions in settings; and (qualitative research) 'participant observation' - the study of natural settings to understand the culture and processes of the groups being investigated. If you are conducting systematic observations you will need an 'observation schedule' before entering the field (Denscombe, 2007: 209-213).

Common issues that affect observation relate to observation uncertainty and consent. The first question you need to ask is should I let people know that they are being observed? Ethically, the answer is almost always yes. You cannot conduct covert observations (i.e. where people don't know) without a very good reason - talk to your supervisor if you think you might have one. An historical example is when jurors in a trial in the USA were covertly observed to get information about their decision-making process. It was thought that the knowledge was worth obtaining in an unethical way, because it affected the justice system. But when you let people know that they are being observed, often they behave differently. When you analyse the data from observations, you need to consider this possibility.

In some situations, you could get over this by letting everyone get used to your presence for a few lessons beforehand, discarding your first few observations, and using only the data from the later ones. You could also get over it by conducting insider research - research in a setting where you already have a role. But this also has drawbacks (see below).

Consider this if:

- Your research topic or problem results in visible behaviour.
- You can gain access to the setting where this behaviour happens.
- Your presence won't change the behaviour too much.
- People won't change what they are doing once they know it is the subject of research.

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Text, document or image analysis:

In this approach, you take the text or image and conduct a systematic analysis. You might look at newspaper articles about migrants in the UK, for example. Or you might be examining the visual representation of gender in comic books. It might be looking at how social workers write case reports. In this case, the main things you need to consider are getting access to the documents, your selection criteria, and your method of analysis.

Getting access may be a significant challenge if you are looking at confidential or restricted data, so make sure this is possible first. A significant amount of information is now available online, but make sure this answers your research questions. Selection criteria means deciding what you will include and what you will exclude. You might decide you are only looking at newspaper articles between particular dates, for example, and from particular newspapers, with particular subjects or titles. Decide this and have a clear justification for your decisions – then stick to them!

You will also want to decide how many documents or images you need before you start the analysis. Finally, choosing the right method for analysis can make or break your project. Options vary significantly depending on your subject but can include: discourse analysis; content analysis; semiotic analysis; visual analysis; thematic analysis. Decide your method of analysis early, because some methods are much more intense than others and will therefore affect how many documents you select.

Consider this if:

- Your topic or problem will be visible or apparent in a text or document.
- You can gain access to the text or documents.
- There is an appropriate method of analysis that you can use to address your topic or problem.

Policy analysis:

Doing a policy analysis means looking at the trajectory, implementation, creation process, changes, content or effectiveness of a particular policy, or policy area. The key to a successful policy analysis is establishing the aim. What is the purpose of analysing the policy?

- Is it to establish whether the policy works?
- To point out problems with the policy?
- To establish how the policy came to have its current form or trajectory?
- To consider how the policy is carried out (implementation)?

Different focuses on policy require different data collection. Policy analysis doesn't have to be a document analysis – it might be looking at how policies are implemented in a particular setting, or it might be interviewing policy makers to find out what they were thinking. How you define policy obviously affects this decision. While many people assume it refers to the written statement, others focus on policy as a social event, meaning that it can include spoken aspects such as a politician giving a speech, as well as actual actions that are taken. Under the latter definition, a wider range of data collection methods are available. Challenges include gaining access to policy makers, sometimes accessing the documents, and understanding the context in which these policies were made and implemented.

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Consider this if:

- You are interested in mechanisms of government and the control they have (or don't) over different areas of social life.

Systematic literature review:

A systematic literature review means treating the literature that you collect as your source of data, and your searching as your method of data collection. This is a common method in medical and health care studies. Conducting a systematic review allows researchers to compare findings of previous studies, make generalisations and reach conclusions about the current state of knowledge. When describing your method, you actually present the search terms you use and the databases you search in. In the results section, categorise and describe the studies that you found.

It's appropriate in an area where there has been a fair amount of research done, but it is all quite fragmented and doesn't really fit together. Keys to success are having clear criteria for which studies you will include and which studies you will exclude, and a good reason for both. The issue is that you have to be very rigid in the searching that you do.

You always have to apply the same search terms, and the same criteria for including and excluding studies. That is what makes it systematic, so you can't change your search terms in one database if you don't find anything. Or rather, if you do change them and find useful information, you then have to go back to all the other databases and apply the new search terms there too. It's normal to have several different sets of search terms, but you always apply the same sets.

Consider this if:

- There is research in your area, but it's all over the place and doesn't have a clear direction.
- Primary data collection is not a requirement for your dissertation.
- There are more than 30 to 40 sources in your topic area.

Secondary data analysis or Archival data:

You would use this method if you had access to data that someone else had collected, that you can re-analyse. For example, there could be a collection of interviews done in the 1980s which can be re-analysed in light of new theories or ideas. In this case, the most important thing is establishing access to the body of data and ensuring that you take a new and original approach in your analysis. From this point forward, you would treat the data exactly the same way as you would if you had collected it yourself.

The challenge is that you have to find out how the original data collection was done, and what the reasons were for doing it this way. You will be subject to the limitations of this approach. For example, if you were analysing the 1980s interviews, you would need to know how they accessed the participants, what their approach to interviewing was, what their approach to sampling was, and all the other questions that apply in the interview section above.

Consider this if:

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- There is an existing body of research that you can access which addresses your question or topic.
- This body of research is better than anything you can collect.
- You can find out how this body of research was collected and you think it was well put together.
- Your project or dissertation specifications don't require you to collect your own data.

Research strategies.

A research strategy or approach is a general plan for your research and a way of thinking about research. Which one you choose depends on the type of research question or issue you are focusing on.

Mixed methods:

In mixed methods, you draw on two or more of the above methods and combine the information you collect. For example, you might conduct classroom observations and supplement them with interviews with teachers about the results of those observations.

Mixed methods seem like a tempting option, because you can balance out the drawbacks of individual methods. But beware. The issue with mixed methods is that you end up with different types of information, so you have to think about how you will analyse the different types of information together. A common problem with using two different methods is that you end up with two separate bodies of data that are difficult to connect.

One option is to do multi-stage research, which means using different methods at different points in your research. You might do a survey to start with, develop interview questions on the basis of the survey results, then do your interviews and compare the results.

Ethnography:

An ethnography is a particular type of mixed methods research, based in anthropology. The idea is that you spend a long(ish) period of time participating in a particular group or community, observe what happens, conduct interviews, collect documents or objects as relevant, take photos, record ceremonies, etc. Then you combine all of this data into conclusions. You should expect to collect data over at least several weeks, and expect that you will collect multiple sources of data. This is a very rich but challenging method. One really interesting trend in modern research is to do virtual ethnographies – getting involved in online communities of interest, and using multiple methods of data collection, all of them online.

Consider this if:

- you are thinking of doing research in a context where you already have a role (at work, a hobby group, a placement, etc.).
- you want to know something about a particular context, environment or social group (e.g. professional identities in midwife-run centres).

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Insider research:

Insider research is where you perform research in a setting where you already have a role. It is commonly done in educational settings by teachers, for example. It means doing research as part of your daily life. A manager could also do insider research within a company. One example could be an analysis of team meetings and the patterns of conversation within meetings and outside meetings. Or they could interview employees and other managers within the company to explore issues of motivation in their setting.

Advantages of this research is that it is often easy to identify research problems within a familiar setting, because you know it so well. It is often also easy to integrate within your day-to-day tasks, and in some cases, can be used to demonstrate personal development or solve problems within the workplace. You also don't have to deal with 'the observer effect', because you are naturally a part of the situation.

Challenges are that it can be difficult to achieve a degree of objectivity which is often thought necessary in academic research. The counter-argument is that, if this is consistent with your beliefs about knowledge, this is actually more valid, not less, because the knowledge of people within a situation can be considered more valid than the knowledge of outsiders. In other words, if you live it, you probably know it best. This is a philosophical position consistent with 'social constructivism' or 'subjectivism'.

More practically, it can be very difficult to balance the demands of good research with the demands of your job or your social network. You need to bear in mind that it could change your relationships, and that your relationships could change the outcome of the research. For example, if a teacher in a school undertakes insider research on teacher practices, interviews and observes her colleagues in the classroom and discovers that there is some really poor practice, what does she do? Does she tell the head? Can she, ethically, if she has agreed with her colleagues that the research should be private? (No, ethically, she really can't, unless she has warned them beforehand that she might.) Can she confront her colleagues? It can be a real minefield.

Consider this if:

- you have a role in a workplace or a social network which is relevant to your degree course.
- you can see problems or issues that research could help with.
- the environment and issue are such that you won't make your life or anyone else's miserable by doing your research.
- you can talk openly and frankly to your management or whoever is responsible for your social network about your research and its outcomes.
- your research can integrate into your daily work or activities without taking over.

Action research:

Action research is conceived of as a cycle, where the point of the research is to identify and try to solve the problem. The findings of the research are based on the evaluation of the attempted solutions, as well as the establishing of the problem. For example, a manager in a company might observe problems with low engagement among the entry-level staff. She might:

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- do interviews with them initially to establish what the problem is,
- decide on a course of action such as workshops or changing job descriptions,
- take that action,
- explore whether it worked or not,
- change it if not,
- and follow up with interviews.

This would constitute an action research cycle. Action research is great to use where you are in a position to implement some form of change or intervention and where you can identify a particular problem already.

Challenges are getting interventions off the ground, getting people to buy into them, timing, and being honest in the evaluation of outcomes. Remember that even if you do something and it doesn't work particularly well, this still counts as useful data. Others can learn from an intervention that didn't go well. Timing is particularly challenging if you are committed to finding an intervention or an action that works, because you have to plan in time for revisions and reiterations.

Consider this if:

- you can see a problem in a context and have some ideas of how to solve it.
- your solutions are practical and you can implement them yourself, or realistically arrange to have them implemented (e.g. you would be unlikely to be able to authorise 50% pay increases, for example).
- you can work out a way to evaluate the efficacy of your solutions.

Case study:

A case study is where you take one or two examples and explore them in depth. An example is often a context or a place, like a school or a company, but could even be an individual person or small group of people. This is in contrast to the approach of sampling, where you take a small proportion to represent the whole population. In a case study, you take one or two people or groups to represent the whole. This means you have to put a lot of thought into how you select your case study.

A lot of people choose a case study on the basis that they can access the context, then have trouble justifying it. You can choose a case study that is representative, or typical of a particular population that you are interested in. For example, this could be a business of average size for a particular industry. Or you could choose an exceptional case, either exceptionally good or exceptionally bad. You could look at an amazingly successful school or a failing school, on the principle that lessons can be learned from both. Or you could choose a case study which is unique for some other reason. However, you select the case, you need to consider what can be learned from it, and who would be interested in knowing about it.

Case studies are great for exploring particular cases in detail. They often go along with ethnographic or other forms of rich data collection.

Challenges include identifying and selecting the relevant case study, which may require privileged information, and also gaining access once the case is identified. Once in the door, you will have to get everybody on board. For example, if you want to do a case study in a particular business, getting permission from the boss doesn't guarantee that every worker will cooperate fully. You will need to persuade as many

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people as possible to engage with you as fully as possible. Then your challenges will mainly be around similar issues as with all the techniques for collecting and managing rich data.

Case studies can be used with insider research, action research, interviewing and ethnographic approaches.

Longitudinal or snapshot:

Longitudinal means over a long period of time; snapshot means once. This is to do with the duration of your research. If your topic relates to change over time, longitudinal research would be a sensible approach.

Longitudinal research could explore, for example, the progress of a couple of students over the course of a year, or gradual improvements as a result of physiotherapy, or changes in attitudes as people start a new job.

Snapshot research is more common, because it takes less time. But it is worth considering whether you can undertake a shorter project that still explores changes at key points, if your topic relates to change over time. If this is not feasible, consider modifying your sampling approach to see if you can identify participants who are at different stages. This way you are doing a snapshot, but you could compare across people to get an idea of how the changes happen.

Further reading:

Bell, J. (2010) *Doing your research project: a guide for first-time researchers in education, health and social science*. 5th ed. Maidenhead: McGraw-Hill Open University Press.

Denzin, N.K. and Lincoln, Y.S. (eds) (1998) *Strategies of qualitative inquiry*. London: SAGE Publications.

Mazon, J. (2002) *Qualitative researching*. 2nd ed. London: SAGE Publications.

Saunders, M., Lewis, P. and Thornhill, A. (2012) *Research methods for business students*. Harlow: Pearson.