

2 OVERVIEW OF QUALITATIVE RESEARCH

Learning Outcomes

By the end of this chapter, you will be able to:

- Understand the purpose of qualitative research
- Appreciate the benefits of qualitative research
- Recognize what counts as research and what does not
- Distinguish between quantitative and qualitative research
- Decide whether or not to use triangulation
- See how qualitative research can contribute to the rigour and relevance of research

2.1 WHY DO QUALITATIVE RESEARCH?

Qualitative research methods are designed to help researchers understand people and what they say and do. They are designed to help researchers understand the social and cultural contexts within which people live.

One of the key benefits of qualitative research is that it allows a researcher to see and understand the *context* within which decisions and actions take place. It is often the case that human decisions and actions can only be understood in context – it is the context that helps to ‘explain’ why someone acted as they did. And this context (or multiple contexts) is best understood by talking to people.

Qualitative researchers contend that it is virtually impossible to understand why someone did something or why something happened in an organization without talking to people about it. Imagine if the police tried to solve a serious crime without being able to talk to the suspects or witnesses. If the police were restricted to using only quantitative data, almost no crimes would be solved. Imagine if lawyers and judges were not allowed to question or cross-examine witnesses in court. The validity and reliability of any court decision would be thrown into serious doubt. So, likewise, qualitative researchers argue that if you want to understand people’s motivations, their reasons, their actions, and the context for their beliefs and actions in an in-depth way, qualitative research is best.

Kaplan and Maxwell (1994) say that the goal of understanding a phenomenon from the point of view of the participants and its particular social and institutional context is largely lost when textual data are quantified.

One of the primary motivations for doing qualitative, as opposed to quantitative, research comes from the observation that, if there is one thing which distinguishes humans from the natural world, it is their ability to talk. It is only by talking to people, or reading what they have written, that we can find out what they are thinking, and understanding their thoughts goes a long way towards explaining their actions.

TYPES OF QUESTIONS USING QUALITATIVE RESEARCH

The questions that a qualitative researcher might typically ask are what, why, how, and when questions:

- **What** is happening here?
- **Why** is it happening?
- **How** has it come to happen this way?
- **When** did it happen?

2.2 WHAT IS RESEARCH?

In a university setting, research is defined as an *original investigation* undertaken in order to contribute to knowledge and understanding in a particular field. Research is a creative activity leading to the production of *new* knowledge. The knowledge produced is new in the sense that the facts, the interpretation of those facts, or the theories used to explain them might not have been used in a particular way before in that specific discipline.

Research typically involves enquiry of an empirical or conceptual nature and is conducted by people with specialist knowledge about the subject matter, theories, and methods in a specific field. Research may involve contributing to the intellectual infrastructure of a subject or discipline (e.g. by publishing a dictionary). In some fields, such as engineering, computer science, or information systems, research can also include the experimental design of new artefacts. Engineers often try to develop new or substantially improved materials, devices, products, or processes.

Of course, as more research is published, the subject matter, theories and methods used in a particular field may change over time. For this reason, scholars in many disciplines will write a literature review of previous relevant research to show that they understand and are up-to-date with the latest thinking.

But how do we know that the research results are new? How do we know that the findings are original? How do we know that the research was conducted in a rigorous manner?

The only way to tell if the research findings are both sound and original is if those findings are open to scrutiny and formal evaluation by experts in a particular field. That

is, the findings must be evaluated by those who are experienced and ‘qualified’ to do so. If these experts, in evaluating the research, find that the results are sound, and that the findings are new *to them*, then we can say that the research project represents an original contribution to knowledge.

This way of evaluating the quality of research in science is called the peer review system. The peer review system exists in all scientific disciplines and is in effect a system of quality assurance. Of course, the peer review system is a social system, and as such it has its drawbacks, but it does ensure that only research of a certain standard is published. I discuss the peer review system and the publication process in more detail in Part VI.

It should be clear from the above discussion that some activities do not count as research in a university setting (Tertiary Education Commission, 2005). Some of these activities are as follows:

- The preparation of teaching materials. Teaching materials are excluded since they are not normally formally evaluated by experts in the field as a whole. For example, case study books written for teaching purposes are written primarily for students, not researchers. As Yin describes, ‘For teaching purposes, a case study need not contain a complete or accurate rendition of actual events; rather, its purpose is to establish a framework for discussion and debate among students’ (2003: 2). The distinction between producing case studies for teaching and research is discussed more fully in Chapter 7.
- The provision of advice or opinion, e.g. consulting work.
- Feasibility studies (where the output is a recommendation to a client).
- Routine data collection (where there is no attempt to contribute to new knowledge in the field as a whole).
- Routine information systems development (where the output is a new or improved product for a client, not the experimental design of a new product or service).
- Any other routine professional practice.

2.3 QUANTITATIVE AND QUALITATIVE RESEARCH COMPARED

There are many different ways to classify and characterize different types of research. However, one of the most common distinctions is between qualitative and quantitative research methods (Table 2.1).

Quantitative research methods were originally developed in the natural sciences to study natural phenomena. Examples of quantitative methods now well accepted in the social sciences include survey methods, laboratory experiments, formal methods (e.g. econometrics) and numerical methods such as mathematical modelling. All quantitative researchers emphasize numbers more than anything else. That is, the numbers ‘come to represent values and levels of theoretical constructs and concepts and the interpretation of the numbers is viewed as strong scientific evidence of how a phenomenon works’ (Straub, Gefen, & Boudreau, 2004). Most quantitative researchers use statistical tools and packages to analyse their data.

Table 2.1 Examples of qualitative and quantitative research

Qualitative research: A focus on text	Quantitative research: A focus on numbers
Action research	Surveys
Case study research	Laboratory experiments
Ethnography	Simulation
Grounded theory	Mathematical modelling
Semiotics	Structured equation modelling
Discourse analysis	Statistical analysis
Hermeneutics	Econometrics
Narrative and metaphor	

Qualitative research methods were developed in the social sciences to enable researchers to study social and cultural phenomena. Examples of qualitative methods are action research, case study research and grounded theory. Qualitative data sources include observation and participant observation (fieldwork), interviews and questionnaires, documents and texts, and the researcher's impressions and reactions. Qualitative data are mostly a record of what people have said. For example, interviews (the most common technique for collecting qualitative data) record what one of your informants said about a particular topic; field notes record what the researcher experienced or thought about a particular topic or event; and documents record what the author of the document wrote at the time. In all cases, these qualitative data can help us to understand people, their motivations and actions, and the broader context within which they work and live.

In the 1980s most business disciplines favoured quantitative research. In the 1990s, however, there was an increased interest in qualitative research in almost every business discipline. The quality of this research improved over time such that many articles using qualitative research have now been published in the top peer-reviewed journals of virtually every business discipline.

My view is that both quantitative and qualitative research approaches are useful and necessary in researching business organizations. Both kinds of research are important, and both kinds of research can be rigorous. Most of the resources and readings cited in this book have been peer reviewed by leading experts and published in the top journals in the various business disciplines. However, there are advantages and disadvantages in each approach.

Generally speaking, quantitative research is best if you want to have a large sample size and you want to generalize to a large population. In this case the objective is to study a particular topic across many people or many organizations. You want to find out trends or patterns that apply in many different situations. Various statistical techniques can be used to analyse your data.

A major disadvantage of quantitative research is that, as a general rule, many of the social and cultural aspects of organizations are lost or are treated in a superficial manner. The 'context' is usually treated as 'noise' or as something that gets in the

way. The quantitative researcher trades context for the ability to generalize across a population.

Qualitative research is best if you want to study a particular subject in depth (e.g. in one or a few organizations). It is good for exploratory research, when the particular topic is new and there is not much previously published research on that topic. It is also ideal for studying the social, cultural, and political aspects of people and organizations. A special section of *Academy of Management Journal* was devoted to the ‘power of rich’ research (see Rynes, 2007).

A major disadvantage of qualitative research, however, is that it is often difficult to generalize to a larger population. You can generalize from qualitative research, but not by using sampling logic. For instance, if you conduct three in-depth case studies of three organizations, a sample size of three does not count for much in statistical terms. Three cases are no better than one. Therefore it is normally impossible for qualitative researchers to make generalizations from a sample to a population.

However, you can generalize from qualitative research to theory, and you can generalize from just one case study or one ethnography (Klein & Myers, 1999; Lee & Baskerville, 2003; Yin, 2003). How you can use qualitative research to make generalizations and how the contributions and quality of qualitative research studies can be evaluated is discussed in each of the chapters in Part III.

Although the qualitative/quantitative distinction in research methods is by far the most common, there are other distinctions which can be made. Research methods have variously been classified as objective versus subjective (Burrell & Morgan, 1979), as being concerned with the discovery of general laws (nomothetic) versus being concerned with the uniqueness of each particular situation (idiographic), as aimed at prediction and control versus aimed at explanation and understanding, as taking an outsider (etic) versus taking an insider (emic) perspective, and so on. Considerable controversy continues to surround the use of these terms (Myers & Avison, 2002). However, a discussion of these distinctions is beyond the scope of this book. For a fuller discussion see Luthans and Davis (1982) and Morey and Luthans (1984). See also Chapter 3 which discusses the various philosophical perspectives that can inform research.

2.4 TRIANGULATION

Triangulation is the idea that you should do more than just one thing in a study. That is, you should use more than one research method, use two or more techniques to gather data, or combine qualitative and quantitative research methods in the one study. Triangulation is an excellent idea if you want to look at the same topic from different angles. It allows you to gain a ‘fuller’ picture of what is happening. It allows you to triangulate data from interviews with data from documents, or data from two different research methods (e.g. a qualitative case study with quantitative data from a survey).

TRIANGULATING CASE STUDY DATA

Doing marketing research, Fournier (1998) conducted three in-depth case studies looking at the relationships consumers form with brands. She triangulated data within her case studies.

She used multiple stories from the same person, interviews conducted with the same persons at multiple points in time, and information from other data sources, such as grocery lists, shelf contents, stories of other household members, and so forth. In addition, researchers who had multiple encounters with informants in previous stages were employed. Thus interpretations were triangulated across researchers and authors as well.

It is relatively common for qualitative researchers to triangulate data within a study using just one research method. For example, a researcher conducting a case study of one organization might triangulate interview data with data from published or unpublished documents; or an ethnographer might triangulate data from interviews with data from observation. Many qualitative research methods require the triangulation of data in some way or other.

Much less common, however, and much more difficult, is when researchers try to combine two or more research methods in the one study. The idea is to triangulate data and findings on the same topic, but to use different methods. Triangulation is especially challenging if the research methods are substantially different in their underlying philosophy or approach, e.g. when researchers try to combine qualitative and quantitative research methods.

TRIANGULATING QUALITATIVE AND QUANTITATIVE DATA

An excellent example of triangulating data obtained from the use of qualitative and quantitative research methods is Markus's (1994a) study of how and why managers use email. Her study questioned the assumptions of media richness theory (that 'richness is better') and demonstrated how a 'lean' medium such as email could be used for complex communication.

To answer her research question, 'how and why do managers use email?', Markus used two research methods. First, she used a quantitative method, a statistically analysed survey. The survey was sent to a large sample of managers. Second, she used a qualitative method called analytic induction. The data were purely textual – mostly she used email messages that were sent by managers. She also obtained data from interviews.

Using both quantitative and qualitative research methods meant that Markus had quantitative data (e.g. frequency of email use) and qualitative data (transcripts of email message exchanges). Her findings and conclusions are rigorous and convincing.

I believe it can be difficult for most people to do this kind of triangulation well. This is because you need to be well trained and become an expert in multiple research methods,

not just one. Also, each method has its own underlying perspective and involves the use of certain techniques. It can take months, if not years, for someone to become proficient in the use of just one particular method, e.g. ethnography. However, if you have the inclination, enthusiasm, and time, this is certainly a worthwhile and viable option. It is something that can be done (Mingers, 2001).

A slightly easier way to achieve the triangulation of research methods is for a single study to include multiple researchers. In this case, each researcher brings to the table his or her own method of expertise and experience. Having multiple researchers and multiple perspectives on any research topic can be positive. A key requirement for the project to be successful, however, is for the researchers concerned to respect each other's expertise and method. There must be mutual respect for any real dialogue to take place. In such cases, the research findings can be truly outstanding.

2.5 RESEARCH IN BUSINESS AND MANAGEMENT

All research in business and management focuses on a topic that is of relevance to one or more of the business and management disciplines. This disciplinary area is actually very broad and, depending upon your background and institution, may include the following: accounting and finance; commercial law; economics; human resource management; logistics and supply chain management; organizational behaviour and organizational development; information systems; management strategy and international business; marketing; and operations management. Of course, these business and management disciplines often build on research from other disciplines, such as statistics, psychology, or sociology. The list of potentially relevant disciplines is very large.

A key feature of a qualitative or quantitative study, as opposed to a purely conceptual study, is that it is an empirical investigation, i.e. it relies on empirical data from the natural or social world. The empirical investigation seeks to contribute to the body of knowledge in a particular field. A simple model of the process of empirical research in business and management is represented in Figure 2.1.

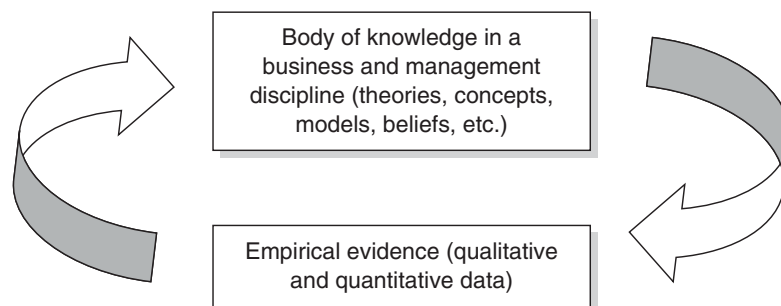


Figure 2.1 A model of research in business and management

As can be seen in the figure, a researcher finds a topic or a research problem that is relevant to the body of knowledge in a particular discipline. Normally, the research questions are derived from the research literature, but they could come from current business practice or your own intuitive hunches (Marshall & Rossman, 1989). In order to answer the questions raised by the problem, the researcher subsequently uses a research method to find some empirical evidence. These findings are hopefully significant enough to be published and hence add to the body of knowledge. A new researcher then comes along and starts the process once more.

2.6 RIGOUR AND RELEVANCE IN RESEARCH

A perennial issue for researchers in business and management is the apparent trade-off between rigour and relevance (Table 2.2). It has become a common complaint over the past decade that research in business schools has become more rigorous at the expense of relevance.

Table 2.2 Rigour and relevance

Rigorous research	Relevant research
'Scientific research'	Relevant to business practitioners
Emphasis on meeting scientific standards such as validity and reliability	Emphasis on being immediately relevant to practice
Subject to academic peer review	Published in consulting reports or industry magazines
Published in academic journals	
Theoretical contribution	Practical contribution

Rigorous research is usually defined as research that meets the standards of 'scientific' research; it is research that has been conducted according to the scientific model of research, subject to peer review, and published in an academic journal. Unfortunately, much of the research that is published in academic business journals is often seen as being too theoretical and of little practical relevance to business professionals.

Relevant research is usually defined as research that is of immediate relevance to business professionals. The research results can be used right away. This kind of research is usually seen as more akin to consulting. Unfortunately, much of this kind of research is difficult, if not impossible, to get published in academic journals in business and management. The lack of a theoretical contribution almost guarantees rejection.

In my own field of information systems, the issue of rigour versus relevance seems to be discussed at almost every conference. Most academics tend to agree with the notion that research in information systems and business schools more generally should be more relevant to business professionals. In practice, however, they are faced with the need to gain tenure and promotion. In order to gain tenure, most business schools in research universities require faculty members to have a record of

publication in reputable academic journals. This job requirement means that most faculty members end up postponing indefinitely their desire (if they have one) to conduct ‘relevant’ research.

As an example of this debate in the management literature more generally, Bennis and O’Toole (2005) argue that business schools focus far too much on what they call ‘scientific’ research. Writing in the *Harvard Business Review*, they claim that business management is not a scientific discipline, but a profession. They lament the fact that business schools have followed a scientific model of research rather than a professional model (as found, for example, in medicine and law). They say that graduating business students are ill equipped to wrangle with the complex, unquantifiable issues that are the reality of business. As most decisions in business are made on the basis of messy and incomplete data, they are particularly critical of statistical and quantitative research which they believe can blind rather than illuminate (Bennis & O’Toole, 2005).

I must admit that I do not entirely agree with Bennis and O’Toole’s argument. In my view, the focus on research in business schools has transformed them from having a mostly vocational focus to being proper scholarly institutions. Faculty members have become scholars rather than consultants. Also, while most academic research may not be immediately relevant to business professionals, it may become relevant over the longer term. In fact, I would argue that one of the failings of contemporary management is the predilection to seek ‘silver bullets’, i.e. quick fixes, or magic solutions to more deep-seated problems. Few silver bullets turn out to be of any long-lasting value.

However, I do agree that research in business and management could be much more relevant than it is right now, and that it should be able to deal with ‘complex, unquantifiable issues that are the reality of business’. And this is where the value of qualitative research lies.

It is my view that qualitative research is perhaps the best way for research in business and management to become both rigorous and relevant at the same time. It allows scholarship and practice to come together. Qualitative researchers study real situations, not artificial ones (as, for example, in a laboratory experiment). To do a good qualitative study, qualitative researchers need to engage actively with people in real organizations. An in-depth field study, in particular, needs to look at the complexity of organizations, including the ‘complex, unquantifiable issues’ that are the reality of business. A case study researcher or an ethnographer may well study the social, cultural, and political aspects of a company.

Hence, if you are trying to decide whether to do qualitative or quantitative research in a business discipline, the choice should not be made on the basis of whether one approach is more rigorous than the other. This would have been a valid question in the 1980s and early 1990s, but it is no longer a valid question today. Rather, the choice should be based on the topic, on the research question you want to ask, on the basis of your own interest and experience, and how relevant you want to be to practice. It is also important to consider the expertise of your supervisor or faculty members in your institution. If you want to use qualitative research but there is no one with the qualifications, interest, or experience to supervise you at your university, then it is probably best to choose a different topic and method, or change university.



Exercises

- 1 Conduct a brief literature search using Google Scholar or some other bibliographic database and see if you can find both qualitative and quantitative articles in your chosen field. What kinds of topics appear?
- 2 Looking at some of the articles you found in more detail, can you describe the research problem and the research questions? Can you describe the research method(s) that the author(s) used? Did any of them use triangulation?
- 3 Looking at these same articles, would you describe some of them as more rigorous or relevant than the others? Why?

FURTHER READING



Books

- There are two books which I recommend for anyone wanting to do qualitative research at PhD level; both these books are required or recommended texts in many doctoral-level courses in business.
- First, *The Sage Handbook for Qualitative Research* (Denzin & Lincoln, 2005) provides a collection of readings with authors selected from many disciplines. It examines the various paradigms for doing qualitative work, the strategies developed for studying people in their natural setting, and a variety of techniques for collecting, analysing, interpreting, and reporting findings.
- Second, *Qualitative Data Analysis: An Expanded Sourcebook* (2nd edn) (Miles & Huberman, 1994) is also very useful.
- A third book that is an excellent primer for novice researchers is *Doing Qualitative Research* (Silverman, 2005).



Websites

There are quite a few useful websites on qualitative research:

- The AISWorld Section on Qualitative Research is at www.qual.auckland.ac.nz/
- The *Qualitative Report* is an online journal dedicated to qualitative research and critical enquiry at www.nova.edu/ssss/QR/index.html
- Sage Publications is arguably the leading publisher of qualitative methodology texts at www.sagepublications.com
- Narrative Psychology is an excellent resource on narrative and related areas at <http://narrativepsych.com>
- The Association for Qualitative Research has useful information at www.latrobe.edu.au/www/aqr/
- QualPage includes calls for papers, conferences, discussion forums, and publishers at www.qualitativeresearch.uga.edu/QualPage



- The *International Journal of Social Research Methodology* is a cross-disciplinary journal designed to foster discussion and debate in social research methodology at <http://tandf.co.uk/journals>
- *Forum: Qualitative Social Research* is a bilingual (English/German) online journal for qualitative research edited by Katja Mruck. The main aim of the forum is to promote discussion and cooperation between qualitative researchers from different nations and social science disciplines at <http://qualitative-research.net/fqs/fqs-eng.htm>
- Evaluation and Social Research Methods has links to books, manuals, and articles on how to do evaluation and social research at <http://gsociology.icaap.org/methods>

