

Applying Qualitative Approach in Business Research

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Abstract

Researchers and students in the business field are increasingly turning to qualitative methods to seek answers for complex research questions. Current literature presents a copious number of published qualitative research compared to previous decades, in which qualitative methods serve mainly as an exploratory inquiry toward more comprehensive quantitative studies. Although qualitative research is now widely adopted in both academia and practice, a dearth of germane literature that argues and discusses key challenges in applying qualitative methods continues to compound the scepticism and ambiguity of the research process. Moreover, details on the analysis process gleaned from research articles are often limited and thus offer little to learn from. Qualitative analysis thus resembles a black box, an analogy of intricacy and complexity. In this editorial, we discuss how to define the scope and goals of a qualitative study, examine current literature, and provide practical guidance for researchers in business to apply qualitative approach and methods. We also detail several steps for qualitative analysis and introduce Computer Assisted Qualitative Data Analysis (CAQDAS) software for this purpose. Finally, we draw from other disciplines to guide and encourage researchers to adopt qualitative research as part of their inquiry endeavour.

Keywords: Qualitative, Methods, Analysis, CAQDAS, Quirkos, Business research.

Introduction

Qualitative research is an increasingly popular methodological choice in business and marketing research, most often using in-depth unstructured data to gain insights into consumers' behaviors (Bathmanathan et al., 2018; Lim et al., 2021; Marshall and Rossman, 2014; Ting et al., 2018) and organizations (Campbell and Göritz, 2014; Creswell and Poth, 2016). Researchers undertaking a qualitative approach can explore complex issues, develop new propositions, and contextualize results from quantitative and mixed-method studies (Taylor et al., 2015). As the business environment and human society become increasingly dynamic, well-administered qualitative research and its related procedures are pivotal not only to eliciting credible data from respondents but also to analyzing and interpreting data that provides meaningful explanations of phenomena.

Qualitative research involves extremely varied and subjective processes (Creswell, 2015; Stake, 2010), therefore methodological clarity plays an essential role in determining the rigor of research and quality of submitted or published papers (Fawcett et al., 2014). However, published research papers generally provide limited details on qualitative methods and techniques used to collect or analyze data. As a result, researchers attempting the qualitative approach unprecedentedly are bound to be confronted by a 'black box' of past studies with few learning exemplars or references. They potentially resort to producing a casual report or rigidly following templates in the methodological section. Shrouded in mystery and ambiguity due to an unclear understanding about the qualitative process, novice researchers, quantitative scholars, and students would be discouraged from exploring and using qualitative design.

Another aspect that is relatively missing from current literature is a practical guide on how to use qualitative data analysis software in different contexts. Other than coding of verbatims, qualitative data analysis software is designed with multi-faceted functions to support researchers in organizing, labelling, realigning, and discovering emerging patterns which ultimately unveil useful insights (Gibbs, 2014; Saldana, 2021; Woods et al., 2016). As qualitative data analysis using electronic methods is growing popular, guidelines on how to report the process in journal articles are vital. Just like predictive models are used to analyze past performance to establish relationships and assess future likelihood of a specific behavior, text analytics can help researchers infer similar insights on consumer and organizational behavior from various analysis of subtle text patterns. Without such standards, insights gathered could be deemed bias and inconsistent, leading to questionable conclusions and recommendations.

This editorial addresses these gaps by presenting key guidelines on conducting qualitative research, supported by emerging Computer Assisted Qualitative Data Analysis (CAQDAS) software. We illustrate how the qualitative research scope and goals should be defined and highlight areas in which researchers should be attentive to at the outset. Researchers and students are encouraged to adopt qualitative methods as part of their research or learning journeys, regardless of their disciplines and preferences. For example, qualitative review approaches offer advantages of generating deeper understanding of literature and contributing to more comprehensive research integration, even across quantitative studies. As such, in the coming years, we invite a wider number of qualitative research submissions to AJBR that exhibit clarity and rigor.

Background

The qualitative research paradigm outlines several key methods or inquiries to determine the design of a particular study. For example, the grounded theory approach is commonly employed in qualitative research to develop or extend a theory pertaining to human phenomena (Corbin and Strauss, 2014; Morse et al., 2016). Ethnography, on the other hand, is adopted to understand, explain, and gain deeper insights into a specific cultural group's behaviors and norms (Collingridge and Gantt, 2008; Lune and Berg, 2017; Tracy, 2019). Unfortunately, many published works suggest that authors have misinterpreted data collection techniques (e.g., interviews and focus groups) as research methods.

This debacle invariably leads to three core issues in qualitative research: First, in the process of their data collection, qualitative researchers often report data saturation is achieved with no emergence of new insights from analyzed data (Fusch and Ness, 2015). It has grown into a readily accepted 'magic word' when determining sample size and to avoid the need for further explanation. Second, in terms of data collection techniques, interviews and focus group discussions are among the most widely used techniques to deal with text data, yet are typically unstructured and choppy (Bernard, 2012; Brockman et al., 2010; Korstjens and Moser, 2017; Nyumba et al., 2018). Consequently, the clarity of procedure falls short in ensuring qualitative data is credible.

Third, qualitative research articles generally tend to mention the analysis and software used in passing, often with just a single line (Asad et al., 2018; Guha et al., 2018). While this manner of reporting does not necessarily compromise the rigor of research and is accepted by most journals, it aptly conveys the extent of confusion or lack of clarity as symbolically referred to as the 'black box'. Despite this convoluted situation is in fact reflective of both quantitative and qualitative research, the problem is more evident in qualitative research due to the wider range of possible analytic approaches and (mis)interpretations of commonly used terminology. For example, the phrase 'thematic analysis' is often used to describe the entirety of the analysis process but is excessively misused, resulting in a comprehensive guide is provided for journal editors to identify mangled implementations (Braun and Clarke, 2019). We thus plan to address the issues above in a future editorial by providing guidelines for researchers to administer qualitative research rigorously across different contexts.

Although it is not mandatory to use CAQDAS software when conducting qualitative research (O'Keeffe et al., 2016; Valos et al., 2018; Ting et al., 2018), researchers should communicate how they used a software or tool with a similar level of detail when describing the qualitative analysis approach. CAQDAS helps to organize, and present data and findings in a coherent manner that addresses and reports potential bias and distortion in the data (Atherton and Elsmore, 2007). Many qualitative research textbooks resoundingly advocate the use of text analytic tools, such as Leximancer (D'Alessandro et al., 2017). Overall, while acknowledging there are multiple issues in qualitative research and reporting, this editorial will delve into four fundamental steps in relation to the general qualitative process: (1) understand your research questions, (2) justify your qualitative research design, (3) analyze your collected data, and (4) use qualitative data analysis software.

Understand Your Research Questions

This first step sounds deceptively simple and obvious but is a fundamental requisite: understand your research problem and questions, and constantly refer back to them. Research questions typically dictate not just the appropriate methodology but also the type of analysis most suitable for the data as well. Moreover, collecting the first set of minimum data would often inform and illuminate which qualitative methods, techniques, and subsequently, analysis to be employed for optimum result. For example, if participants' responses are curt, 'choppy', or single-worded, a detailed discourse analysis of the language and how people express themselves might be unrealistic in this particular scenario.

Hence, concurrent reviewing and refining the analysis approach while data is being collected is also important. Qualitative researchers widely advocate an ongoing and cyclical approach to data collection and analysis, rather than waiting for a complete set of data to be collected before conducting the first round of analysis. It allows the researcher not only to identify issues respondents have not discussed, whereby the questioning or recruitment strategy might be altered, but also to determine a certain 'saturation point' of the research. A researcher can obtain data saturation throughout a study by collecting rich (quality) and thick (quantity) data. In addition, qualitative researchers do compromise on a few basic principles and concepts of data saturation, which are often referred to when there is neither new data, themes, and coding nor the ability to replicate the center of the study (Braun and Clarke, 2021; Guest et al., 2006; Saunders et al., 2018). Thus, staying focused on the research questions is essential as data collection and interpretation progresses. As stated earlier, we plan to address these issues in the upcoming editorial.

Justify Your Qualitative Research Design

Researchers who have previously used quantitative approaches or whose supervisors or colleagues subscribe to a positivist view of research might find it challenging to explain and justify aspects of qualitative research. A common outcry by qualitative researchers or students is that the analysis process is subjective, untrustworthy, time-consuming, lacks rigor, and concerns ethical issues (Oppong, 2013; Queirós et al., 2017). They might also have been advised about their small sample size and as a result, they should attempt to interview hundreds of participants. These criticisms generally show a lack of understanding about the aims of qualitative research as well as its design and procedures.

Qualitative researchers aim not to test measurable hypotheses but to explore a specific phenomenon with ill-defined research problems and multi-layered realities, where there are possibly dozens of ideas and theories to provisionally validate. According to Maxwell (2008), qualitative research works under the universe of meaning, attitudes, aspirations, and values, which reacts to more in-depth expressions of relationships, interactions, and experience that cannot be haphazardly quantified and reduced to operationalized variables. Therefore, qualitative research is concerned with a deeper understanding and exploration of the dynamics of social relations. Researchers seek to probe the collected data from different angles in order to tease out possible explanations of a complex phenomenon (often guided by theoretically grounded procedures) which would be highly inhibitive with a single-minded focus on a specific objective question.

A superior qualitative research recognizes and details the researcher's worldview, background, and potential biases. Bias is an inherent and inevitable component of the entire research process, in both qualitative and quantitative methods of inquiry. The call here is not to give up on the research endeavor or abandon the quest for truth and understanding of our world, but to acknowledge and disambiguate the researcher's role in the research process and how their positionality may influence the research. They are an intrinsic instrument in qualitative research design and analysis, and an embedded part of the research's process and outcomes. Reflexivity statements are encouraged as they help make this explicit, not just to researchers but also to readers.

In putting the respondents' opinions and views forward as the prime focus of qualitative research, researchers simultaneously accept the existence of multiple perceived realities. Each respondent exhibits nuanced lived-in perceptions and experiences, thus attempting to impose the external notion of objective truth on them renders a disservice to their expressed data in the research process. Additionally, it is a misconception to equate qualitative study to less data. What qualitative samples lack in breadth, they make up for in depth, allowing researchers to explore a few illustrative cases in greater detail. For example, in a business research, we might not have access to a large number of participants, especially when they are few in number (such as senior managers) or difficult to engage with (such as senior ministers). However, a detailed amount of data from a small number of such eminent expert participants can provide great insights.

Manage Your Qualitative Data

Qualitative data comprises words or textual data that is not based on numerical figures. Textual data can readily be drawn from many sources, such as interview transcripts, diaries, books, reports, or journals, which should be analyzed concurrently with data collection (Natow, 2019; Renner and Taylor-Powell, 2003; Shareia, 2016). Qualitative analysis strategies fall into three main groups: categorizing strategies (such as coding and thematic analysis), connecting strategies (such as narrative analysis and individual case studies), and memoing and displaying (Maxwell, 2008; Miles and Huberman, 1994). Germane literature indicates three types of coding analysis: open coding, axial coding, and selective coding. These are analytic procedures; it does not necessarily follow that the researcher moves from open to axial to selective coding in a strict and consecutive manner (Corbin and Strauss 1990; Vollstedt and Rezat, 2019).

A key challenge in qualitative analysis is managing the volume and richness of collected data. While the sample size may be small, the amount of data for each respondent can be considerable. For example, a typical transcript from a one-hour semi-structured interview can reach as much as 8,000 words. The lack of structure in the collected data can pose a challenge, as respondents possibly provide useful data in the course of a non-linear and even tangential natural free-flowing conversation. Qualitative research does not specify fixed rules for sample sizes since the depth of collected data is more essential than its quantity. Instead, determining the sample size depends on focus of study, topic of discussion, purpose of inquiry, validity of collected data, and time and resources available to conduct the research (Boddy, 2016; Burmeister and Aitken, 2012; Sim et al., 2018).

Before attempting to code or structure collected data in any way, it is recommended to read and re-read the transcripts. ‘Immersing’ in the data and knowing it thoroughly by heart should be the first task. For other analytical approaches, in fact, reading data is the main and only activity. Most methods of analyzing qualitative data essentially involve reading transcribed data in various ways, trying to see it under different lights to uncover what lies beneath the surface. Researchers generally start with a cursory ‘thematic’ or content analysis: a relatively literal reading of the data to note what respondents have explicitly talked about. Researchers might then start to ‘tag’ or code sections of text that refer to interesting themes. As the reading progresses through successive generations, more unique and abstract patterns begin to emerge. This process of re-reading the data helps in understanding emerging patterns. Indeed, previous analyses can help gain a higher and deeper understanding of theoretical concepts that begin to answer the research questions.

Qualitative researchers use various techniques to sort and manage the huge amount of data collected such as manually laying out printouts of data transcript, organizing sticky notes, and using color highlighters to identify interesting sections of data on particular topics. Others may use mapping exercises with flip-chart paper on a wall or large desk, enabling them to physically navigate around the data, draw connections between sources and themes, and experiment with different ways of thematically grouping data. An example is the One Sheet of Paper or ‘OSOP’ approach (Ziebland and McPherson, 2006).

It is also possible to use standard word-processing or spreadsheet software to manage markups and notes on the data, wherein tools like comments, tables, and columns can be employed to store different aspects of the analysis (Meyer and Avery, 2008). Alternatively, there are dedicated software packages designed to facilitate qualitative analysis. These are tools that primarily help with the management of qualitative data by keeping sources in a repository, structuring and managing coding frameworks and lists of topics, and storing metadata on the research. They also have features for users to code and annotate data as well as to create reports, summaries, and visualizations of specific data segments. These tools are often referred to in the literature as CAQDAS (Computer Assisted Qualitative Data Analysis) software or QDAS (Qualitative Data Analysis Software).

However, researchers should not assume the analysis to be complete once they have coded all the data sources. Qualitative data analysis is an iterative and cyclical process, with multiple levels of understanding and interpretation building upon each stage of analysis. Researchers commonly attempt one method of data analysis before finding themselves in a quandary whereby the approach could be inappropriate for the collected data, or they might be unable to answer or manage the research question. In these situations, it is necessary to restart the analysis with a different approach – perhaps using a different coding methodology or not using coding at all. Many might find this demoralizing after investing significant time in interpreting collected data using the initial approach; nonetheless, the previous work is rarely wasted – it is part of an iterative process of understanding the data structure. Qualitative software facilitates and supports the iterative analysis process, making it easier or ‘safe’ to start over, experiment, and change categories. When using paper, however, researchers can grow attached to their physical creation and become wary of starting all over again.

Another way to address limitations of a single-person qualitative data interpretation and analysis process is to do it collaboratively or as part of a team. The task can be split in different ways. On one hand, different data sources can be given to different researchers to analyze, following which common patterns are subsequently discussed. On the other, multiple people can analyze the same sources and compare their interpretations. Statistical tools to measure inter-rater reliability (the extent to which different coders agree with one another) can be used if necessary. Sharing projects for work to be reviewed can also be useful between students and supervisors when learning qualitative analysis. Saldana (2021) suggested that team coding or collaborative coding allows multiple ways of interpreting and analyzing data by sharing and understanding the study's phenomena. Members can conduct coding in their team and combine findings for cross-checking and reality checks. Researchers and team members can also conduct Inter Coder Agreement to enhance the reliability of collected data.

An important caveat is to understand that the aim of qualitative analysis varies significantly from quantitative techniques. Statistical approaches look for means and outliers, assuming that some form of average is the optimal way to summarize variance across a dataset and that outliers are anomalies. On the other hand, qualitative analysis does not assume every research participant has similar experiences; thus, the use of statistics is inappropriate to average out differences. Qualitative analysis importantly acknowledges diversity in the data pool, captures and communicates the variety from different angles, and even to an extent embraces and explains 'outliers' or unexpected findings. Analyzing qualitative data, therefore, embodies a relentless pursuit of challenging assumptions for interpretations to be as flexible as the collected data requires.

Utilize Qualitative Data Analysis Software

At the time of writing, there are at least ten qualitative software packages in active development – choosing one can be an overwhelming decision. These packages feature similar basic operations and researchers show equally positive receptivity across all the tools available in the market in terms of their functionality and ease of use. Selecting a befitting software depends on the data and analysis technique to be applied, as well as a researcher's personal preferences in relation to how they structure and sort their data and themes. Major software packages include ATLAS.ti MAXQDA, Nvivo, Quirkos, and Dedoose.

Researchers who have experience using one or more of these software packages would readily allude to their evolutionary lifecycles. In other words, these packages release regular updates, while new software and tools are rapidly customized to cater to new demands. For example, one of the newest packages, Quirkos, is specifically designed to appeal to qualitative researchers who have found other software packages challenging to learn. Despite its reduced feature set, it nevertheless offers a simple operation which has attracted many small market research agencies in the UK which value Quirkos' quick learning process.

Figure 1: Interface and Functions of Quirkos

Source: (Quirkos, 2022)

All the major packages provide free trials of the software, meaning researchers can experiment with the software's layout and operation before committing to one particular platform. Adversely, users could possibly become too enticed by the software's innovative features and use it in situations that are inappropriate for the collected data. For this reason, Silver and Woolf (2015) advocate a process whereby researchers first decide which analysis tools they require before they explore various software options, then breaking the process down into strategies and tactics to choose the apt software that meets the analytical needs of a research question.

A recent notable development enables researchers to move 'coded' or analyzed qualitative analysis projects from one software package to another. Known as the 'REFI-QDA' exchange format (qdasoftware.org), it is currently supported by Atlas.TI, NVivo, Transana, F4Analyse, Quirkos, QDA Miner, and many other software packages expected to follow suit in the next few years. This means that it is much easier for researchers to use a range of tools from different qualitative software packages to complete their analysis. For instance, they may start the analysis in one tool before moving to another to use a specialist feature or generate a particular visualization.

Academics can sometimes be apprehensive about using qualitative software. For example, they argue that users are indirectly compelled to using coding or specific types of analysis based on a software's program. They also contend that when using software, users are often distanced from their collected data, resulting in quantification of the data and removal of context (Cypress, 2019; Weitzmann, 2000). While these are legitimate concerns, they are caused by misuse of the particular software rather than the intended factor of its use. Other commenters posit that these are badly misquoted criticisms that remain resurrected in the literature (Jackson et al., 2018).

For example, a software does not necessarily require users to code data just because it provides the coding feature; users can just use the comment or memo features and disregard any coding. While software does allow for quantification of data, it is often a mistake to rely on this feature for analysis. Researchers should instead constantly be revisiting the data text to view quotes in context. Case in point, Quirkos, by default, does not show the number of quotes assigned to each code but rather displays the text of each quote and its source for users to verify its origin. The goal is to constantly keep users grounded in the text of the data.

However, researchers often fall into the misconception that the software will automatically execute and complete the coding or analysis. In truth, there is no ‘magic button’ in any software that will perform qualitative analysis and interpretation of a dataset. They are only tools to help manage the researcher’s own interpretations of data. CAQDAS neither decides what codes or themes exist in the data nor chooses which sections of text belong in each category or theme. There is software today complete with so-called ‘auto-coding’ tools but are only limited to basic descriptive analysis based on statistical keyword searches and may not capture important themes. After all, the software does not understand what your data is about and does not know the research questions – it nonetheless remains the researcher’s role to interpret and understand the data.

Since the software serves merely as a tool, it can be used in flexible ways to help researchers analyze data. For example, to find unexpected and surprising elements within the dataset, codes can be created to represent these unknowns, called ‘meta-themes’, and subsequently use them in the software to keep track of parts of the data that need further investigation. In fact, researchers can tag and keep track of sections of data that do not form part of the coding framework but will help in the analysis and interpretation process. To illustrate, a theme called ‘Key Quotes’ can be created for a research question, and thereafter the best or most interesting parts of the data can be assigned to ‘Key Quotes’. During the manuscript writing process, users can view their assigned ‘Key Quotes’ on any particular topic across all sources. These are likely to be the illustrative examples they use to justify their interpretation of data. Meta-themes such as ‘Things I don’t understand’, ‘Unexpected quotes’, or ‘Issues to come back to’ can be created to aid the researcher in managing the analysis process.

Notable data presentation features enable business practitioners such as marketers, managers, and executives to present their findings in scientific presentation formats with colourful code labels as ‘at a glance’ references. Apart from that, complex coding systems can be organized into proper hierarchies and networks for users’ quick reference, ultimately eases data presentation. Most qualitative data analysis software supports remote project access. For instance, Quirkos allows internal and cloud storage for users to access data and information at their convenience. Such flexibility and shareability features assist in accelerating the managerial decision-making process within organizations.

**Figure 2: Unravelling the Black Box of Qualitative Research:
The Iterative Four Fundamental Steps**



Conclusion

Throughout this editorial, we have unpacked 4 fundamental steps which are integral to the general qualitative research process. Qualitative research is as an interwoven tapestry of concepts, methods, techniques and procedures that are often regarded as convoluted and perceived as unclear to researchers – hence, the ‘black box’ analogy in this editorial, which we attempt to unravel to provide a clear and methodical stepping-stone for researchers to understand what qualitative methods can produce and how it can be administered. The iterative nature of the 4-step qualitative research process allows researchers in business to explore a wider extent of qualitative research applications in terms of (1) framing and understanding research question, (2) justifying the research design, (3) managing the collected data, and (4) utilizing data analysis software to systematically execute the process. As the current global business landscape endows broad research opportunities, particularly in business research, including the fields of marketing and consumer behaviour, we hope researchers who plan to conduct qualitative research and authors who intend to submit their manuscripts to AJBR will find the process a lot more purposeful and feasible.

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