

Qualitative Research Essentials: A Methodological Debate

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Abstract

In recent times, qualitative research has become a focal point of interest in education and the social sciences because it can reveal meaning, context, and lived experiences in ways that quantitative data cannot. However, while many postgraduate researchers genuinely appreciate qualitative inquiry for its potential, they often have to confront its philosophical foundations as well as the practical demands of using its methods confidently and rigorously. This article aims to make qualitative inquiry more accessible for novice researchers by connecting key paradigms to methodological decisions and research practice. The paper discusses key methodologies for data collection, including interviews, focus groups, observations, and document analysis, while also acknowledging the complexities of qualitative inquiry across various contexts. The article also elaborates on the analytic process from coding to categories to themes while noting the role of reflexivity and transparency in establishing credibility. Quality issues, such as dependability, authenticity, and credibility, are also addressed, as is the role of digital technologies and new designs in engaging qualitative practice. By balancing theoretical depth with practical examples, this article engages and supports social transformative postgraduate researchers in carrying out rigorous and meaningful qualitative inquiry.

Keywords: Qualitative Research, Data Collection, Coding, Thematic Analysis.

Introduction

Due to its capacity to explore layers of complexity that cannot be expressed in numbers, qualitative research is a vital mode of inquiry in education and the social sciences. Qualitative research begins with a focus on meaning, process, and context, shifting the inquiry from defining "how many" to asking more profound questions about "how" and "why." For example, in education, it can only begin to explore how teachers organize their professional identity, how students cope with the stress of assessment, or how communities react to reform. In other fields, such as sociology and applied linguistics, it has examined cultural, linguistic, and power issues that purely statistical approaches would overlook. Qualitative researchers should never forget, as Denzin and Lincoln (2018) remind us, that qualitative research is a situated practice: it puts the researcher in the world and converts this world into realities interpreted through a myriad of meanings participants create. The growing use of qualitative methods is a recognition that many of the educational and social questions emerging today are multifaceted and highly localized. Globalization, migration, technological change, and cultural diversity all raise questions that a survey cannot fully address. For example, to explore how a digital learning environment informs engagement, it is essential to consider lived experience and ways of being in the world; measuring experience through a numerical response does not provide an adequate understanding. Similarly, understanding how

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new teachers build confidence relies on digging into individual stories, institutional context, and identity revision. These examples illustrate why qualitative research is ideal, as it provides the depth necessary to capture the richness of human experience.

However, many postgraduate students still approach qualitative inquiry with anxiety, despite this acknowledgment. In contrast to quantitative studies, which typically follow a series of linear design, data collection, and statistical analysis steps, qualitative research may seem indefinite and vague. Students want to know crucial practical staging questions: How many interviews are too many? Do I use focus groups or observation? How does one move from initial codes to larger, more thematic codes? These are examples of why qualitative inquiry can be messy, as there is not a single specific path to follow, although it can be described in a few different terms.

Worries about subjectivity add another layer of discomfort. From a positivist standpoint, qualitative studies may be perceived as biased or anecdotal, as the researcher is involved in both producing and interpreting the data. Some of this confusion stems from conflicting opinions among supervisors, textbooks, or completed workshops — some mention saturation, while others discuss reflexivity; some describe thematic analysis as a simple process, while others describe it as complicated. The variation leaves students uncertain about what constitutes good practice.

Another issue arises when researchers fail to provide details in published research articles. When reading, many journal articles only display a few sentences stating how the data were collected or analysed, and the iterative and reflexive processes of qualitative research appear to be obscured. Students are confronted with the final product, which presents thematic analysis as succinct themes and clearly written narratives, but do not consider coding decisions, struggles with analysis, or debates about the analysis. The lack of transparency then creates the misconception that qualitative analysis is unclear and arbitrary, when in fact, it is systematic, supervised, and follows traditions. This paper addresses these concerns by providing postgraduate researchers with both conceptual guidance and practical approaches. By elaborating on key assumptions and demonstrating methods through a pragmatic lens, it hopes to shed light on and thus demystify the qualitative inquiry process. Conceptually, it situates qualitative inquiry within its broader philosophical assumptions, reminding students that methodological choices cannot be divorced from questions of ontology, epistemology, and axiology. Practically, it introduces the core techniques of data collection, interviews, focus groups, observations, and document analysis, and explains how these methods can be implemented responsibly and systematically. It then turns to analysis, outlining the processes of coding, categorisation, and theme development, with examples drawn from educational and linguistic research.

This article is intended to serve two purposes. Pedagogically, it serves as a valuable resource for students new to qualitative research, clarifying terms that are often assumed, illustrating abstract concepts with concrete examples, and highlighting common pitfalls. From a scholarly perspective, this article engages with ongoing debates. It draws on recognised authorities, such as Braun and Clarke (2022), who emphasise thematic analysis as a reflexive practice, and Saldaña (2021), whose influential work on coding illustrates how descriptive tags can be developed into richer analytic insights. By weaving these perspectives together, the paper not only provides practical direction but also positions students within wider discussions about what constitutes rigour in qualitative research.

The dual focus demonstrates the character of qualitative inquiry. Qualitative inquiry is not merely a set of techniques to execute studies; instead, it embodies an attitude toward knowledge and meaning. Postgraduate students' skills will be developed through conducting research that strives to be philosophically coherent and methodologically robust. It means to demonstrate 'why' a semi-

structured interview is consistent with constructivist assumptions, 'why' the coding of transcript data reflects 'more' than an automatic action of grouping together 'words', and 'why' reflexivity enhances credibility, rather than questioning it. What postgraduate researchers need are tools that bridge the gap between theoretical writing and basic "how-to" manuals, linking theory and practice in the middle ground.

Overall, the article argues that qualitative research can be systematic, rigorous, and meaningful for humans. While it may seem messy, what it boils down to is the reflexive, adaptive, and acute atonement to lived experience, all of which count. An adaptive paradigm does not imply a practice lacking discipline, but rather one that requires explicit acts of transparency and justification. By attending to these matters, it is hoped that the paper will provide postgraduate students with the confidence and critical attention needed to prepare for an academically rigorous qualitative inquiry.

Philosophical and Theoretical Foundations

Every research project is built on assumptions about reality, knowledge, and the researcher's role in the research process. Those assumptions are not always made explicit; however, they underlie everything, from the way the research question is framed to the interpretation of the findings. As postgraduate students, becoming aware of these assumptions assists in understanding why qualitative research is differentiated from quantitative traditions. Quantitative work, stemming from a positivist and post-positivist stance, operates with a value placed on objective measurement of the world. In contrast, qualitative inquiry stems from constructivist, interpretivist, and critical paradigms, which, instead, privilege meaning, context, and reflexivity (Creswell & Poth, 2018; Lincoln & Guba, 2018).

Ontology: The Nature of Reality

Ontology considers the assumptions that are made about reality. Within positivist traditions, reality is considered unitary and external, a phenomenon that is independent of human observation and can be objectively measured. On the other hand, qualitative researchers, for example, those who approach an ontological stance from a relativist perspective, posit that reality is pluralistic, socially constructed, and contextually dependent. For instance, when a qualitative researcher explores novice teachers' professional identity, they are not seeking a singular and universal truth; instead, they explore different realities shaped by a multitude of personal histories, institutional contexts, and cultural realities. Qualitative inquiry seeks to embrace these multiple realities in order to bring out diversity and avoid the simplification of generalisation.

Epistemology: The Nature of Knowledge

Epistemology deals with the question of what qualifies as valid knowledge and how we can become aware of such knowledge. On the one hand, positivist epistemology assumes that knowledge can be objective and therefore discovered by the researcher, who is not a part of the phenomenon being studied. In contrast, in qualitative research traditions, knowledge is often understood as something that is co-constructed by the researcher and participants. Interpretivist epistemology emphasises that the researcher is not a neutral observer but an active participant in meaning-making. For instance, in an interview about online learning, the participant's narrative is shaped not only by their own experiences but also by the questions asked, the rapport with the researcher, and the broader context of the conversation. This view reframes qualitative data as

produced rather than found, highlighting the relational nature of knowledge (Kvale & Brinkmann, 2015).

Axiology: The Role of Values

Axiology refers to the role of values in research and inquiry. Post-positivist traditions often stress the neutrality of researchers, suggesting that values should be minimized or bracketed to avoid bias. Qualitative researchers, however, acknowledge that values are always present and that trying to eliminate them is neither possible nor desirable. Instead, they embrace reflexivity, the practice of critically examining how the researcher's background, assumptions, and values shape the study. Reflexivity does not diminish credibility; rather, it enhances it by making the researcher's influence transparent (Berger, 2015). For example, a teacher-researcher studying classroom practices must reflect on how their dual role as an insider shapes both access to participants and interpretation of data. By foregrounding reflexivity, qualitative research positions values not as contaminants but as integral to the interpretive process.

Methodology: Linking Assumptions to Practice

Methodology provides the bridge between philosophical assumptions and the practical strategies of data collection and analysis. A constructivist paradigm, which assumes multiple socially constructed realities, often leads to methodologies such as phenomenology, ethnography, narrative inquiry, or case studies, each designed to capture subjective experiences within their context. Critical paradigms, which view reality as shaped by power and inequality, may lead to methodologies such as critical ethnography, feminist research, or participatory action research. Pragmatist perspectives, meanwhile, allow researchers to combine qualitative and quantitative methods in ways that best serve the research questions (Morgan, 2007). For postgraduate students, the key insight is that methodology is not simply a matter of preference; it must align with the researcher's ontological and epistemological commitments.

Paradigmatic Diversity and Flexibility

One of the strengths of qualitative inquiry is its openness to paradigmatic diversity. While constructivism and interpretivism remain dominant, critical and transformative approaches have gained prominence, especially in fields concerned with social justice, equity, and decolonisation. For example, research on gendered barriers in Gulf universities may draw on a critical paradigm to uncover how institutional structures perpetuate inequality. Another hallmark of qualitative research is flexibility. Pragmatist thinkers who aim to avoid viewing paradigms as rigid commitments propose that paradigms should serve as flexible guidelines rather than rigid hurdles. This flexibility ensures that researchers have the freedom to approach a study based on the context of the complex, dynamic reality in which they operate.

Implications for Postgraduate Researchers

For many postgraduate researchers, grappling with philosophical underpinnings can seem abstract, complex, or intimidating. However, these philosophical assumptions permeate all methodological choices. Saying "I chose interviews because this is a commonly used approach" does not provide an adequate rationale. Students should be able to explain why interviews are consistent with their own paradigm, how meaning is co-constructed with participants, and how they negotiated their own positionality in the context of the research. Making these connections explicit helps to establish both rigor and coherence.

Understanding these foundations may also help students overcome the established discomfort with subjectivity in qualitative research. It has already been discussed that qualitative inquiry implies that meaning is co-produced, and reflexivity is touted as a means of rigor; these notions demand a reframe of "bias" as transparency, rather than adhering to expectations of neutrality. Instead of achieving the impossible feat of proxying a position of neutrality, students may wish to demonstrate how their own positionality influenced the collection and analysis of data, as a means to increase and enhance the credibility of a research study rather than reduce or weaken it.

Qualitative Data Collection

Qualitative data collection is the point at which abstract philosophical assumptions manifest themselves in practical research activities. In comparison to quantitative approaches that rely on standardized instruments and detached observation, qualitative inquiry privileges meaning, context, and co-construction of knowledge. In qualitative inquiry, data are not extracted from participants; instead, they are created through interactions and attention to lived experiences (Merriam & Tisdell, 2016). This stage of the research process can be both exciting and intimidating for postgraduate students. On the one hand, the prospect of entering participants' worlds is exciting; on the other hand, it feels intimidating due to the challenge of balancing openness to participants with the need for a systematic organization of data. The following discussion introduces core methods, including interviews, focus groups, observations, and document analysis, while also considering the growing role of digital and multimodal techniques.

Interviews

Interviews are among the most common methods in qualitative research because they give researchers direct access to participants' perspectives and experiences. Unlike surveys, they allow exploration of meanings, motivations, and interpretations. They can range from structured, with fixed questions asked in sequence, to unstructured, resembling open conversations. Most postgraduate projects rely on semi-structured interviews, which strike a balance between guiding questions and the flexibility for participants to expand, shift topics, and shape the dialogue (Kvale & Brinkmann, 2015).

For instance, a study of novice EFL teachers might begin with prompts about professional identity but naturally move into issues such as institutional pressures or aspirations. This format keeps the research focused while still letting participants' voices lead. Success depends not only on asking questions but also on building rapport, listening carefully, and using probes to elicit more comprehensive responses.

At the same time, interviews raise ethical questions about power and representation. Researchers set the agenda, yet participants hold experiential authority. Reflexivity is therefore vital, as factors such as the researcher's role as teacher, peer, or outsider inevitably shape what participants reveal.

Focus Groups

Focus groups extend the logic of the interview into a collective format, enabling the researcher to observe not only individual accounts but also the dynamics of the group as a whole. They are particularly valuable when exploring shared experiences, contested issues, or the social construction of meaning (Morgan, 2019). A well-facilitated focus group enables participants to respond to one another's contributions, yielding insights that may not emerge in one-to-one interviews.

For instance, a study exploring students' experiences of online learning during the COVID-19 pandemic might use focus groups to reveal collective frustrations (such as unstable internet connections) and strategies of resilience (such as forming peer study groups). Here, the data come not only from what participants say but also from how they agree, disagree, or build on each other's accounts.

Running effective focus groups requires careful attention to group size, facilitation, and dynamics. Groups of six to eight participants are generally optimal: large enough to accommodate a diversity of views, yet small enough to allow all voices to be heard. The facilitator's role is not to dominate but to encourage balanced participation, ensuring that quieter members are invited to contribute and that dominant voices do not overshadow the discussion.

Focus groups raise unique ethical and methodological challenges. Confidentiality is more challenging to guarantee because participants can hear each other's contributions, making it difficult to ensure that information is kept private. Researchers must therefore emphasize the importance of discretion and create a safe environment for open discussion. Additionally, cultural norms may influence group interaction: in hierarchical contexts, junior participants may defer to senior ones, requiring the researcher to manage dynamics sensitively.

Observations

Observation is another cornerstone of qualitative data collection, offering insights into practices and interactions that participants themselves may not articulate. Observations can be participant, where the researcher is actively involved in the setting, or non-participant, where the researcher adopts a more detached stance (Cohen, Manion, & Morrison, 2018). Both approaches have strengths and limitations. Participant observation allows for insider perspectives but risks over-identification; non-participant observation provides distance but may miss nuances of meaning.

For example, in an ethnographic study of classroom feedback practices, a researcher might take detailed fieldnotes on how teachers respond to student writing. While interviews might reveal teachers' beliefs about feedback, observations capture what they actually do, including non-verbal cues, timing, and peer interactions. Observations, therefore, provide data that are embodied, contextual, and often taken for granted.

Systematic recording is essential. Researchers often use observation protocols to structure their attention, focusing on aspects such as patterns of teacher talk, seating arrangements, or types of classroom interaction. Fieldnotes should combine descriptive detail with reflexive commentary, noting not only what happened but also how the researcher interpreted it. As with interviews, reflexivity is crucial: the presence of the researcher may alter behaviour, a phenomenon known as the Hawthorne effect. Recognising and reflecting on this influence enhances rather than diminishes credibility.

Documents and Artefacts

Qualitative researchers also draw on documents and artefacts, which provide material traces of social practices. These may include institutional policies, lesson plans, reflective journals, student assignments, or even digital texts such as blogs and social media posts. Analysing such sources allows researchers to access perspectives that extend beyond interviews or observations, and to triangulate insights across different forms of data (Bowen, 2009).

For example, a study of curriculum reform might analyse policy documents alongside teacher interviews to compare official discourse with classroom realities. Similarly, lesson plans can be analyzed in conjunction with classroom observations to identify discrepancies between what

teachers plan and what actually occurs in practice. Document analysis requires attention to authenticity, context, and purpose, and involves asking questions such as who created the document, for whom, and for what purposes.

Digital and Multimodal Approaches

Digital and multimodal approaches to research are increasingly being adopted, driven by the impact of online learning, social media, and virtual communication. For example, when researchers conduct practical section interviews via Zoom or Teams with participants located in different geographic areas, they gain the possibility of a broader longitudinal reach, which includes issues of rapport and confidentiality. Digital ethnography has similarly opened up digital pathways for studying online communities and online practices in digital spaces, such as WhatsApp, Twitter, or gaming platforms. However, it continues to provoke ethical issues regarding consent, anonymity, and other dilemmas (Pink et al., 2016).

Broadly, and taking this a step further, a multimodal research design combines different data types, such as text, audio, video, or digital traces. For instance, a multimodal study of academic writing might include a dataset that comprises surveys, interview transcripts, samples of student essays, and contributions from online forums. Although these represent diversity and a greater accumulation of data, what they lack is a careful organization and integration that could disorientate researchers in the volume, diversity, and richness of multimodal data.

Challenges and Considerations

Although the depth of qualitative data collection is an indicator of usefulness, it also presents some significant challenges. Access is often difficult to secure in institutional contexts due to gatekeeping, and trust requires time and cultural sensitivity to establish. Another challenge is dealing with the substantial amount of materials generated through interviews, focus groups, and observations that need to be transcribed, organised systematically, and stored securely.

In addition to ethical obligations, engaging with sensitive and personal narratives in qualitative research requires the researcher to obtain informed consent, maintain confidentiality, and respect the participants' right to withdraw. In a focus group setting, it is necessary to remind participants that confidentiality cannot be guaranteed. In a digital space, the distinction between the public and private spheres also requires ethical consideration.

Finally, postgraduate students must strike a balance between flexibility and focus. Qualitative methods encourage openness to emergent insights, but without a clear connection to research questions, data collection risks becoming unfocused. The challenge is to remain adaptive while ensuring that choices are transparent and justified.

Data Analysis Foundations

If qualitative data collection provides the raw material of inquiry, analysis is the process through which that material is transformed into meaningful findings. It is during analysis that transcripts, field notes, documents, and digital artifacts are organized, coded, and interpreted to address the research questions guiding the study. For postgraduate students, analysis is often the most daunting stage of the research process. Unlike quantitative traditions, where the steps of analysis are typically pre-determined by statistical procedures, qualitative analysis is iterative, flexible, and interpretive. However, this flexibility should not be mistaken for looseness. As Braun and Clarke (2022) remind us, qualitative analysis involves systematic engagement with data, careful decision-making, and reflexive awareness of the researcher's role.

Interpretation, Not Just Description

A central distinction in qualitative analysis lies between description and interpretation. Description refers to the careful representation of what participants said or what was observed. While description is necessary, it is not sufficient. Interpretation goes further, identifying patterns, making conceptual connections, and linking findings to broader theoretical or practical debates (Nowell et al., 2017). For example, describing that students report "stress before exams" offers surface-level insight. Interpreting stress as part of a broader theme of "academic identity struggles" demonstrates analytical insight. For postgraduate students, recognising this shift is crucial: analysis is not about paraphrasing data but about generating insights that contribute to knowledge.

Iterative and Cyclical Processes

Qualitative analysis is rarely linear. Researchers move back and forth between data, codes, categories, and emerging themes in a cyclical process. Early coding may produce descriptive labels, which are then refined into more interpretive categories. These categories are revisited as new data are collected or as theoretical ideas develop. This iterative nature reflects the close relationship between data collection and analysis in qualitative research. In ethnography, for instance, observations and interviews are often analyzed in real-time, shaping subsequent fieldwork. In grounded theory, coding and data collection proceed simultaneously, with analysis guiding new sampling decisions (Charmaz, 2014). Such cycles require flexibility, but also careful documentation, so that the analytic process remains transparent.

The Role of the Researcher

One of the defining features of qualitative analysis is the researcher's active role in the research process. Unlike quantitative analysis, where the aim is often to minimise researcher influence, qualitative analysis recognises that interpretation is shaped by the analyst's perspectives, values, and positionalities. Reflexivity, ongoing critical awareness of how one's assumptions influence the study, is therefore essential (Berger, 2015). For example, a teacher-researcher analysing interviews with colleagues must reflect on how their insider status shapes both the questions asked and the interpretations drawn. Far from being a weakness, this reflexive acknowledgement enhances rigour by showing that findings are not accidental but produced through transparent and thoughtful engagement.

Transparency and Rigour

Because qualitative analysis depends on interpretation, transparency is key to demonstrating rigour. Researchers need to document clearly how data were coded, how categories were constructed, and how final themes emerged. Audit trails, reflexive memos, or detailed accounts of the methodology support this. For example, presenting a coding tree to illustrate how initial codes evolved into categories, then into broader themes, makes the analytical journey more transparent. This transparency enables examiners and reviewers to track the rationale for the findings, which contributes to credibility and trustworthiness (Nowell et al., 2017).

Preparing for Detailed Methods

This introductory overview to qualitative analysis prepares us for subsequent discussion, which will be of increasing depth. The following section addresses coding as the first analytic step in outlining methods for labeling and working with data. Next, we consider developing categories and themes, including an interpretive shift from description to conceptual understanding. Though

we separate these phases here for clarity, in practice, they are a continuous process. They highlight the fact that qualitative analysis is not just random or mechanical (though it can be methodical) but a structured yet flexible process, informed by traditions of methodology and supported by reflexivity.

Coding

Coding marks the first systematic step in converting raw data into meaningful findings. It provides the structure through which researchers can organize their material, make sense of it, and begin to form a theoretical framework. Saldaña (2021) describes coding as the 'critical link' between data collection and theme development; it can often feel daunting for postgraduate students. The journal articles we read tend to showcase the final themes, without the trial and error decisions that shaped those themes. This can make coding seem far too technical and somewhat mysterious. In this section, we will clarify what coding is, identify the key approaches to coding, and provide practical tips and guidance on how it can be done systematically.

Defining Coding

Coding is the process of assigning labels to portions of data that summarize their meaning and significance. These labels—words, short phrases, or conceptual tags—indicate what the statement means; they are more than an administrative task for the researcher to accomplish. Coding is also an interpretive activity where the researcher intends to determine what is important and how it relates to other pieces of data. For example, a first-year teacher might say, "I always feel nervous when I know senior colleagues are observing my teaching," which could be identified as anxiety when being observed. In another example, "I am constantly having to prove myself" might be identified as a struggle for legitimacy. Codes demonstrate emerging common concerns that can eventually be organized into broader categories or themes.

First-Cycle Coding

The first part of analysing qualitative data is what Saldaña (2021) refers to as first-cycle coding. In this stage, the goal is to generate an initial set of codes that systematically describe and summarize the material. There are several different ways to reflect the data; descriptive coding assigns simple labels to topics, e.g., "feedback practices" or "peer support." In vivo coding, as its name might suggest, adheres to the words of participants; for example, 'I felt like an outsider' would be coded simply as 'outsider'. Process coding demonstrates actions, using gerunds, e.g., "negotiating identity" or "seeking support," while emotion coding focuses on affects, drawing attention to feelings of frustration, hope, or excitement. Each of these is exploratory and, as a result, a wide range of codes might be produced, which might be refined later. Postgraduate students are advised not to narrow it down too quickly, as preserving the richness of the initial data creates better opportunities for deeper analyses later on.

Second-Cycle Coding

Following first-cycle coding, the researcher proceeds to second-cycle coding, a process that emphasizes synthesis. At this stage, the researcher aims to consolidate the often lengthy first-cycle code list into more general categories of data that represent shared patterns in the data. As an example, codes such as anxiety under observation, fear of judgment, and worry in an evaluation context could be clustered under a category like performance-related anxieties. Similarly, codes such as mentorship, learning from peers, and networking could be grouped as sources of support.

This coding step moves the analysis from descriptive detail to a more conceptual level. Ongoing comparisons continue to check if new codes belong with existing categories or require revision. This iteration is fundamental to qualitative analysis and constantly pushes researchers to move beyond surface-level trajectory observations towards a more in-depth interpretational insight.

Deductive, Inductive, and Abductive Coding

In qualitative research, coding can be either deductive, inductive, or abductive, depending on the study's purpose and design. Deductive coding begins with a framework based on an existing theory or previous studies. For example, in a study of teacher motivation, data may be coded according to the categories of autonomy, competence, and relatedness from self-determination theory. This approach offers a good amount of clarity and direction, but may miss out on insights that are not easily fit into the pre-determined framework. Inductive coding proceeds in the opposite direction, allowing codes to emerge from the data itself. This approach is frequently employed in exploratory research or within the grounded theory tradition, particularly when the researcher is open to unforeseen findings. However, this approach can lead to an overwhelming and difficult-to-manage number of codes. Finally, abductive coding is a combination of subsequent moves between theory and data (Timmermans & Tavory, 2012). For postgraduate researchers, this approach is often the most practical, as it allows them to begin with broad guiding concepts while still leaving space for unanticipated patterns that arise from participants' narratives.

Manual vs. Software-Assisted Coding

Coding can be done manually, using highlighters, sticky notes, or spreadsheets, or with the assistance of specialised software such as NVivo or Atlas. Ti, or MAXQDA. Manual coding is beneficial for small datasets, as it encourages close reading and analysis. However, it can become cumbersome with large projects. Software does not "do the analysis" for the researcher, but provides organizational tools for storing, retrieving, and visualizing codes. For instance, NVivo can generate word frequency counts, code co-occurrence matrices, or visual diagrams that help identify connections between codes.

The choice between manual and software-assisted coding depends on project size, resources, and the researcher's preference. Regardless of the tool, the quality of coding depends on the researcher's interpretive engagement, not on the technology.

Reflexivity in Coding

Because coding is an interpretive act, reflexivity is essential. Researchers must continually ask: why am I noticing this pattern? How do my assumptions shape the codes I create? What alternative interpretations might exist? Reflexivity can be documented through analytic memos, short reflections written during coding that capture emerging ideas, doubts, and questions.

For example, a researcher coding data from teachers might write:

I notice I am paying more attention to negative experiences of identity than positive ones. Is this because of my own frustrations in teaching? I need to re-check whether I am coding support as systematically as I am coding struggles.

Such reflections make the analytic process more transparent and strengthen trustworthiness.

To illustrate, consider a study exploring novice teachers' professional identity in Gulf universities. Initial first-cycle codes might include "feeling like an outsider", "proving myself", "learning through mistakes", and "finding a mentor". These could be refined in second-cycle coding into

categories such as struggles of legitimacy and sources of support. Over time, these categories may point to a broader theme of negotiating legitimacy in early-career teaching.

This example illustrates that coding is not merely a data reduction process, but also a creative and interpretive one. It enables researchers to move from individual voices to broader insights that remain grounded in participants' lived realities.

Generating Categories and Themes

Coding lays the groundwork for analysis, but categories and themes give it depth. Codes alone summarise small data segments, yet without further synthesis, they remain scattered. By grouping related codes, categories create order, while themes push the analysis further by highlighting patterns that address the research questions. For postgraduate researchers, transitioning from codes to categories and then to themes can feel demanding, but it is also the point at which qualitative inquiry reveals its true explanatory strength.

From Codes to Categories

Categories represent the intermediate step between coding and thematisation. At the same time, codes tend to be specific and descriptive; categories cluster codes that share conceptual similarities. They are more abstract than codes yet more grounded than themes. For example, in a study of undergraduate writing anxiety, first-cycle codes might include "fear of red ink," "stress from time limits," and "comparing grades with peers." These codes, when considered together, can be organised under the category of performance-related stressors.

The process of generating categories is both inductive and iterative. Researchers constantly compare codes with one another to identify similarities and differences, grouping those that align conceptually. This is often referred to as the constant comparative method, originating in grounded theory but widely used across qualitative traditions (Charmaz, 2014). The act of clustering codes forces researchers to move beyond surface-level description and begin conceptualising the underlying issues that run across the dataset.

Categories also serve a practical purpose: they help manage the large number of codes that often emerge in first-cycle coding. Without categories, analysis risks becoming unwieldy, as dozens or even hundreds of codes remain disconnected from one another. By consolidating these codes, researchers create a more manageable framework that facilitates thematic interpretation.

From Categories to Themes

Themes represent a higher level of abstraction. They go beyond simply grouping similar codes to articulate patterns of meaning that speak directly to the research questions (Braun & Clarke, 2022). While categories answer the question "what is happening in the data?", themes ask "Why does this matter?" and "How does it relate to the broader phenomenon under study?"

For instance, in the writing anxiety study, categories such as performance-related stressors, identity insecurity, and coping strategies might together contribute to a broader theme of the emotional labour of academic writing. Here, the theme captures not only discrete issues but also a more holistic understanding of how writing anxiety is experienced and navigated by students.

Themes, therefore, provide the interpretive lens through which findings are presented. They are not mere summaries of topics but analytic insights that offer an argument about the data. In this sense, themes are actively constructed by researchers rather than passively "discovered." This perspective challenges the common misconception that themes "emerge" from data, as if they pre-

exist waiting to be uncovered. Instead, researchers make interpretive decisions about which patterns to highlight, how to connect them, and how they answer the research questions.

Reflexivity in Thematic Development

Since theme development involves interpretation, reflexivity becomes vital. Researchers must consider why specific categories are emphasised over others and reflect on how their own backgrounds shape the analysis. For instance, someone who has faced academic anxiety may pay more attention to stress and self-doubt while overlooking resilience. Reflexive memos make such choices transparent (Berger, 2015). Reflexivity also applies to theoretical orientation: some focus on explicit, surface meanings, while others seek hidden assumptions or ideologies. Both semantic and latent approaches are valid, but they must align with the researcher's paradigm and be clearly stated in the methodology (Nowell et al., 2017).

Alternative Analytic Pathways

Although thematic development is one of the most widely used approaches to qualitative analysis, it is not the only pathway available to researchers. Different methodological traditions shape how categories and themes are generated. Grounded theory, for example, treats categories as the fundamental building blocks of theory, with researchers engaging in constant comparison of data until theoretical saturation is achieved (Charmaz, 2014).

Narrative analysis, by contrast, often pays less attention to identifying themes across participants and instead focuses on the storied structure of individual accounts, highlighting how people construct meaning through narrative form (Clandinin & Connelly, 2000). Discourse analysis offers yet another alternative, examining how language itself constructs social realities and framing "themes" not as patterns of experience but as discursive repertoires or ideologies that circulate in texts and talk (Fairclough, 2013).

For postgraduate researchers, recognising these alternatives is crucial. It demonstrates that methodological choices continually shape the process of moving from codes to higher levels of interpretation. There is no single "correct" way to generate categories and themes; what matters is that the analytic approach is consistent with the chosen paradigm and that decisions are reported with transparency. Thus, developing categories and themes is best understood not as a fixed formula but as a flexible, context-sensitive process that ensures analytic choices remain consistent with the overall goals of the study.

Writing Up Themes

After themes have been constructed, they should be communicated as part of a coherent narrative rather than as a mere list. Each theme should be discussed in detail, incorporating quotations from participants to illustrate the theme, and mapping it onto existing literature. Visual aids, such as thematic maps, can further clarify the interrelationships between the categories. Nonetheless, it is essential that themes are grounded in the accounts of participants and should not be exaggerated or generalized beyond what the data permit.

The process of moving from codes to categories to themes is the central analytic stage for qualitative research. The process of moving and transitioning between codes, categories, and themes is what transforms fragmented pieces of data into interpretive insights that can answer the research question being contemplated and contribute to larger theoretical conversations. Even though students enrolled in programs of study that include research are admittedly anxious at this stage of the research process, tools such as constant comparison, visual mapping, and reflexive

memoing can make the process systematic and manageable. Themes are not "discovered" as pre-existing entities within the data, but rather are constructed through transparent interpretation. Moreover, when themes are crafted meaningfully, they are worthwhile findings in the sense that they emerge as credible and are relevant to ongoing conversations and debates in educational research and social sciences.

Ensuring Rigour and Trustworthiness

One of the most frequent worries about qualitative research, particularly among students trained in quantitative traditions, is whether it can demonstrate the same level of rigour. Because qualitative studies do not rely on statistical tests, numerical reliability, or generalisability in the conventional sense, some assume they are less systematic. In reality, qualitative research has its own well-established standards of quality, framed around concepts such as trustworthiness, credibility, reflexivity, and authenticity. Far from being a weakness, the interpretive and contextual nature of qualitative work can produce findings of remarkable depth and relevance, provided researchers are transparent and consistent in their methods.

For postgraduate students, demonstrating rigour is not optional. Examiners and journal reviewers expect a clear articulation of how quality has been pursued and evidenced. The following sections introduce the key criteria of rigour in qualitative research and outline practical strategies for achieving them.

Trustworthiness as a Framework

Guba and Lincoln's (1994) framework of trustworthiness remains one of the most influential ways of conceptualising rigour in qualitative inquiry. They identified four key criteria:

1. Credibility refers to the confidence that findings accurately represent the realities of the participants.
2. Transferability refers to the extent to which findings can be applied in other contexts.
3. Dependability is the stability of findings over time and across researchers.
4. Confirmability, assurance that findings are shaped by participants' voices rather than researcher bias.

Later, they and others added authenticity (fair representation of different perspectives, including marginalised voices) and reflexivity (continuous self-awareness of the researcher's role). These criteria are not mere checklists but guiding principles that assist qualitative researchers in demonstrating methodological integrity.

Credibility

Credibility is often explained as the qualitative equivalent of internal validity in quantitative research, examining whether the findings genuinely reflect participants' lived experiences. There are many ways researchers can enhance credibility. First, researchers can establish credibility by spending extended periods in the field, referred to as prolonged engagement, as this helps build rapport and create a more comprehensive understanding of the research context. Second, triangulation is another method to enhance credibility by drawing on multiple approaches to data collection (e.g., interviews, observations, and documents) to add complexity and reduce dependence on a single source of information. Third, member checking allows participants the opportunity to approve or revise the overall interpretations of what they say. At the same time, peer debriefing offers a strategy of critique from a colleague or supervisor. For example, projects examining novice teachers' professional identity could include interviews, reflective journals, and

documents, which would yield a more detailed and credible image of how identity is negotiated in the work of novice teachers.

Transferability

Unlike quantitative research, which seeks statistical generalization, qualitative research aims for transferability by providing readers with sufficient information on the research context to judge whether the findings are relevant to their own context. Transferability is supported through *thick description*, which provides rich and detailed accounts of the setting, participants, and research processes, allowing others to assess the relevance of the study. By richly describing the research setting, postgraduate students enable readers to make informed judgements about the relevance of findings. For instance, a study of student engagement in an Omani university classroom should detail the institutional culture, class size, and pedagogical practices, so that readers elsewhere can decide if the insights apply to their own settings.

Dependability

Dependability parallels reliability in quantitative research. It refers to the consistency and stability of findings over time. While human experiences inevitably change, researchers can demonstrate dependability by showing that their analytic process was systematic and traceable. Strategies include maintaining audit trails (detailed records of decisions, coding frameworks, and analytic memos) and ensuring transparency in methodological reporting. Some researchers also use inquiry audits, in which external reviewers examine the data and analysis to verify coherence.

Confirmability

Confirmability ensures that findings are grounded in participants' voices rather than in the researcher's preferences. While qualitative analysis is interpretive, it should not be arbitrary. Strategies include maintaining reflexive journals that record the researcher's assumptions and potential biases, using direct participant quotations to support claims, and providing transparent links between raw data, codes, categories, and themes. For example, presenting excerpts of student narratives alongside the researcher's interpretation demonstrates that interpretations are rooted in evidence.

Authenticity and Reflexivity

Beyond trustworthiness, scholars such as Lincoln and Guba (2018) emphasize authenticity, which refers to the extent to which research accurately represents diverse voices, including those that are marginalized or silenced. Authentic research does not merely present consensus, but also acknowledges tensions and contradictions.

Closely related is reflexivity, which requires researchers to interrogate their own role in the production of knowledge. Reflexivity is not a one-off statement of positionality but an ongoing practice throughout data collection and analysis (Berger, 2015). Postgraduate researchers should document how their identities, values, and relationships with participants shape the study. For example, a teacher-researcher studying colleagues must reflect on how insider status influences access, interpretation, and power dynamics. Far from undermining rigour, reflexivity strengthens it by making analytic processes transparent.

Practical Challenges in Qualitative Data

Qualitative inquiry provides richness and depth, but also has challenges that postgraduate students may find overwhelming. Methodology texts often describe methods as neat and linear, but the actual practice of gathering and analyzing qualitative data is usually more complex, requiring flexibility, creativity, and perseverance. Acknowledging these challenges, not only to prepare

researchers for what they will find, but also to demonstrate rigor and transparency in writing, is valuable. This section outlines four of the most common challenges faced by qualitative researchers: recruitment and access, data volume, subjectivity, and the limitations of time and resources. It suggests practical strategies for addressing these challenges.

Recruitment and Access

Postgraduate researchers typically encounter access and consent barriers as their first obstacle. Recruiting will not be straightforward, especially in institutional contexts that require permission from principals, programme coordinators, or ethics boards. For instance, a project that investigates teachers' professional identity will need time to obtain multiple layers of permission, which could slow down progress and/or compromise participation.

Equally important is establishing trust with participants. Individuals may be unwilling to speak candidly due to fears of repercussions from employers or colleagues. This is particularly relevant in universities in the Gulf (or South Asia), for example, and may be a decisive factor in determining what an individual feels comfortable divulging, given the nature of institutional politics. Researchers can help address these concerns by clearly outlining the study's purpose, providing assurances of confidentiality, and being flexible with interview arrangements, whether in terms of format or location.

Managing Large Volumes of Data

Qualitative research generates vast amounts of data, interview transcripts, observation notes, focus group recordings, and document collections. Postgraduate students often underestimate the labor required to organize and analyze such material. Transcription alone can be daunting: a single one-hour interview may produce 15–20 pages of text, and multiple interviews can quickly accumulate into hundreds of pages. Without systematic organisation, the data can become overwhelming.

To address this, researchers should establish data management systems from the outset. Using software such as NVivo, Atlas. Ti, or MAXQDA, can help organize codes, categories, and themes. Meanwhile, spreadsheets or cloud-based platforms can manage metadata. Even when resources are limited, consistent file naming, secure storage, and precise documentation of analytic decisions are essential. Data management is not merely administrative; it is integral to ensuring transparency and reliability in research.

Balancing Subjectivity and Credibility

Another common challenge is negotiating the tension between the researcher's subjectivity and the need for credible findings. Postgraduate students often worry that their personal perspectives will "bias" their analysis. However, as discussed earlier, qualitative research recognises subjectivity as an inevitable and even valuable aspect of inquiry. The issue is not to eliminate subjectivity but to handle it reflexively.

Reflexivity requires researchers to make their assumptions explicit, record analytic choices, and remain open to alternative readings of the data. For example, when a teacher-researcher inquires into the practices of a colleague, they might understand how shared experiences have both shaped the questions that person posed and influenced their interpretations of the interaction. Even in qualitative research, where researchers aim to present themselves as neutral, they demonstrate rigor by reflecting on their insider position as researchers. Engaging in strategies such as securing feedback from a supervisor, engaging in mutual dialogues with peers, and maintaining analytic memos are all ways to manage subjectivity while sustaining the trustworthiness of the study.

Time and Resource Constraints

Qualitative projects often take more time and effort than students expect. Drawing participants, conducting interviews, transcribing, and writing up the project all entail sustained work in a way that surveys do not. Surveys do not collect a large sample quickly; you can distribute a survey. If you are trying to manage study with a job or family, the total amount of work in a qualitative project might feel unmanageable. To complicate matters, money is often a concern; travel, transcribing, or even software can be more than the budget. This sometimes changes the methods a student can follow through with, such as aiming to conduct a certain number of interviews or using pre-coding and notecards instead of software. What some students struggle with is acknowledging these methodological decisions in their proposal or final report. However, when these decisions are disclosed, it is not regarded as a methodological deficit but rather as a demonstration of methodological awareness and credibility, which the examiners favor.

Technology and Innovation in Qualitative Research

The field of qualitative research has undergone significant changes due to the advent of digital technologies. While the central tenets of qualitative inquiry — consideration of meaning, context, and lived experiences — remain the same, digital tools have expanded the possibilities of qualitative research by increasing efficiencies, thereby allowing for more robust analysis and providing opportunities for new forms of data. As well, digital research presents new ethical and methodological challenges. For graduate students, critically engaging with digital research tools is important both in terms of practical data management issues and for situating their work within larger conversations about research in a digital world.

Software for Data Management and Analysis

One of the most notable advancements has been the emergence of Computer-Assisted Qualitative Data Analysis Software (CAQDAS), including NVivo and Atlas. Ti, and MAXQDA. Used by researchers to organise, code, and visualise data, these programs are not a replacement for the researcher's interpretative work (Woolf & Silver, 2018). NVivo, for example, allows researchers to code transcripts and group them into larger themes, and provides additional visual features, such as coding trees or word clouds, to show patterns in the material. For students managing large amounts of data, these types of programs provide a way to establish order and provide clear audit trails. It must be acknowledged that excessive reliance on computerised programs can be problematic, especially if coding is viewed as a mechanical task. Supervisors will frequently emphasize the need for CAQDAS to be a supplement, rather than a substitute, for reflexivity and critical analysis.

Digital Ethnography and Online Data

Another area of innovation is digital ethnography, which adapts ethnographic principles to the study of online environments. With the rise of social media, virtual learning platforms, and digital communities, researchers now explore how identities, practices, and cultures are constructed in virtual spaces (Pink et al., 2016). For example, a study might examine how university students in Oman use WhatsApp groups for collaborative learning, or how migrant communities in Europe use Facebook to maintain transnational ties.

Online data collection offers unique opportunities, including access to dispersed populations and naturally occurring interactions. However, it also raises complex ethical issues: what counts as "public" online data? Do researchers need consent to analyse tweets or forum posts? Scholars

generally argue that participant expectations of privacy should guide ethical decisions (Markham & Buchanan, 2012). For postgraduate students, this means carefully negotiating institutional ethics protocols and being transparent about how digital data are obtained and analysed.

Multimodal and Visual Data

Technology has broadened the types of data available to qualitative researchers. Alongside text, many now use audio, video, images, and other digital artefacts in their studies. For instance, classroom research may involve recording teacher–student interactions for later transcription and coding. Visual methods, such as photo-elicitation or participant-created drawings, can capture experiences that are difficult to express in words. These multimodal strategies deepen inquiry by highlighting embodied and affective aspects of experience, but also require specialized analytic approaches and careful attention to storage and the ethical handling of images.

Emerging Tools: AI and Automation

A recent development in qualitative research is the increasing use of artificial intelligence (AI). Tools like Otter.ai or transcription features in platforms like Zoom have dramatically reduced the time required to convert a recording to text (although the accuracy of such tools depends on factors such as accent and audio quality). Some qualitative software now offers AI features that suggest codes or highlight possible patterns within data. Such tools can help make qualitative work easier, but there is also the caveat of potentially removing researchers from the interpretive engagement qualitative analysis entails. For this reason, we encourage students to view AI as a facilitator of the process rather than a replacement for their own analytical work. Furthermore, AI offers promising avenues for the future in analyzing massive datasets that researchers would not otherwise be able to analyze manually.

Opportunities and Challenges

Technological change offers both opportunities and dilemmas for qualitative researchers. Digital tools can help increase efficiency in data analysis, facilitate engagement with participants across distances, and allow researchers to engage with a broader range of data types. However, while these benefits create possibilities, they also give rise to new technological demands, such as digital literacy and vigilance toward emerging ethical risks. For example, while video data can provide thick descriptions, it also heightens the risk of confidentiality breaches. Similarly, while analytics may enable researchers to conduct quicker analysis, artificial intelligence software may also perpetuate latent bias. The challenge for postgraduate researchers is to engage with technology in an informed and critical manner, contemplating not only what the technology can offer, but also when and how using technology aligns with their methodological strategies and ethical principles. In constructivist approaches, for example, digital outputs (or outputs generated through AI tools) are best positioned as reflective prompts, rather than objective facts of research.

Writing Up Qualitative Data Analysis

For many postgraduate students, one of the most challenging stages of qualitative research is writing up the analysis. While the processes of collecting and coding data may seem relatively straightforward, transforming those analytic insights into a clear and convincing narrative for examiners or journal reviewers often feels far more daunting. Unlike quantitative results, which are often presented in tables and statistics, qualitative findings must weave together interpretation, evidence, and the voices of participants. This requires a balance of structure and creativity:

structure to ensure that the argument is coherent, and creativity to capture the richness of participants' experiences.

Structuring the Findings

The first step in writing up qualitative analysis is deciding on the structure. A common approach is to organise findings around themes developed through coding and categorisation. Each theme becomes a sub-section of the findings chapter or article, with supporting data presented and interpreted under that heading (Braun & Clarke, 2022). For example, in a study on writing anxiety, themes might include *performance-related stressors*, *coping strategies*, and *identity tensions*. Structuring the chapter around these themes helps readers see how the analysis answers the research questions.

Another approach, often used in narrative or case study research, is to organise findings around participants' stories or cases. Here, the researcher presents each case in detail before moving to cross-case comparisons. This approach preserves the individuality of participants while still drawing broader insights. Whatever the structure, the key is clarity: the reader should understand how the organisation of the chapter reflects the analytic choices made.

Integrating Data and Interpretation

Qualitative writing requires integrating data excerpts (such as participant quotes, fieldnotes, and documents) with the researcher's interpretation. Excerpts provide evidence, while interpretation explains why the excerpt is significant and how it relates to broader themes. Presenting long blocks of quotes without analysis is insufficient. Likewise, abstract interpretation without participant voices risks losing credibility.

For instance, a researcher might write “I always feel nervous when senior colleagues observe my lessons.” (Fatima, Interview 3)

This quote could then be interpreted:

This sense of nervousness illustrates how early-career teachers experience observation as a threat rather than a developmental opportunity, a pattern echoed across several participants' accounts. It reflects the broader category of performance-related anxieties, which, in turn, contribute to the theme of negotiating legitimacy in early-career teaching.

Here, the quotation grounds the claim in participant experience, while the interpretation links it to categories and themes, showing the analytic process transparently.

Representing Participant Voices

One of the key strengths of qualitative research is its ability to foreground participants' voices. However, representing those voices requires sensitivity and care. Quotations should be selected not only for their vividness but also for their representativeness of broader patterns. Relying too heavily on a single individual may bias the analysis, while overreliance on numerous quotes from farmers can overwhelm the narrative.

The trick is to strike a balance using excerpts that are representative of typical experiences, along with the occasional outlier that presents variability or discord. Pseudonyms accompanied by contextual details, such as participants' occupations or contexts, allow researchers to report discoveries in a manner that feels authentic while also providing anonymity. However, likely as important is reflexivity, or being transparent about the fact that, as a researcher, one chooses which voices to highlight and why.

Using Visuals and Displays

Visual representation tools can facilitate a more transparent and approachable qualitative analysis. For instance, thematic maps, coding trees, and joint displays illustrate how codes form categories and how these categories coalesce into higher-order themes (Nowell et al., 2017). Joint displays can be beneficial in mixed methods studies because they can also demonstrate how qualitative themes relate to the quantitative findings. A case of a thematic map could illustrate how codes such as fear of being judged and stress around observation can be represented by the category 'performance anxieties,' which relates to a higher-order theme of identity struggles for novice teachers. Visual representation not only enhances transparency but also helps guide readers who may be less familiar with qualitative research and analysis.

Conclusion

The purpose of this article is to demystify the collection and analysis of qualitative data for postgraduate researchers in the fields of education and the social sciences. It provided a brief history of the philosophies behind qualitative inquiry, introduced some primary data collection methods, and gave an overview of how coding, categorisation, and theme generation occur in practice. Alongside these methodological discussions, it emphasised the importance of rigour, ethics, and reflexivity, while also noting the expanding influence of digital tools and offering advice on how to present findings clearly and convincingly.

The central argument is that qualitative research should not be understood as a step-by-step formula but as a reflexive and interpretive practice. It relies on attentiveness to participants' voices, transparency in analytic decision-making, and recognition of how the researcher influences the construction of knowledge. By making these processes explicit, postgraduate students can move beyond uncertainty and engage in qualitative inquiry with confidence and a methodologically grounded approach.

Several insights are reinforced throughout the discussion. The article demonstrates that paradigmatic foundations, ontology, epistemology, and axiology are not abstract theories, but rather practical guides that inform design choices and the types of knowledge claims that can be made. Data collection is highlighted as an inherently relational activity, dependent on trust, cultural sensitivity, and ethical responsibility, whether through interviews, focus groups, observations, or document analysis, particularly in digital and multimodal settings. Coding is framed as an interpretive act rather than a mechanical one, with categories and themes built to provide depth and coherence.

Rigour is closely tied to transparency, supported by criteria such as credibility, dependability, transferability, and reflexivity. Ethics are positioned as an ongoing responsibility that extends well beyond initial approval. The role of technology is acknowledged as both promising, through tools such as CAQDAS, digital ethnography, and AI, and challenging, requiring critical awareness in their use.

Taken together, these elements help to demystify qualitative inquiry by offering both conceptual clarity and practical strategies. The paper positions qualitative research as systematic, reflexive, and ethically attentive, equipping postgraduate students with the skills and confidence to produce work that is both credible and impactful.

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