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REVIEW

# Methods of Data Collection in Qualitative Research: Interviews, Focus Groups, Observations, and Document Analysis

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**Abstract:** Qualitative research offers invaluable tools to explore the depth and complexity of human experiences, social interactions, and contextual influences. This paper examines four central qualitative data collection methods: interviews, focus groups, observation, and document analysis, highlighting their purposes, processes, strengths, and challenges. Interviews facilitate a detailed exploration of individual perceptions and lived experiences, while focus groups leverage group dynamics to uncover collective meanings and social norms. Observation allows researchers to document real-world behaviours, interactions, and contextual factors that participants may be unaware of or unable to articulate. Document analysis provides access to historical, institutional, and personal records, offering naturally occurring data that contextualise and corroborate findings from other methods. This paper also discusses key ethical considerations and the importance of triangulation in enhancing credibility and depth. By integrating these complementary methods, qualitative researchers can construct a nuanced, multidimensional understanding of complex social phenomena, thereby contributing to educational research and broader social science enquiry. This review serves as a practical guide for scholars who are particularly new to qualitative research or those transitioning from quantitative approaches, seeking to harness the richness of qualitative research to investigate human behaviour and meaning-making in diverse contexts.

**Keywords:** qualitative research, data collection methods, focus groups, document analysis, educational research, human behaviour, social contexts

# 1 Introduction

Qualitative research plays a crucial role in exploring human experiences, social interactions, and contextual meanings. Unlike studies that rely on numerical data and statistical analysis, qualitative research seeks to understand phenomena using rich descriptive data that capture the depth and complexity of human experiences [1]. It emphasises subjective meanings, individual perceptions, and social contexts, making it particularly valuable for exploring nuanced topics that cannot be easily quantified [2]. Central to this approach are diverse data collection methods that enable researchers to gain deep insights into participants' perspectives, behaviours, and lived experiences [3, 4].

The purpose of this paper is to provide an accessible introduction to four key qualitative data collection methods: interviews, focus groups, observations, and document analysis, particularly for researchers and educators who may transition from quantitative to qualitative methodologies or are new to qualitative research. Interviews provide a direct way to explore individual thoughts, emotions, and narratives, offering an in-depth understanding of participants' viewpoints [3]. Focus groups facilitate interactive discussions in which collective perspectives emerge through dialogue, making them useful for exploring shared experiences [5]. Observations allow researchers to capture behaviours, interactions, and contexts in real-world settings, revealing patterns that may not be accessible through questioning alone [6]. Document analysis, on the other hand, provides access to existing textual or visual materials such as reports, diaries, and media content, offering valuable historical and contextual insights [7].

By analysing these four methods, this paper highlights their contributions to qualitative research and educational enquiry [8]. Understanding these approaches is essential for researchers who aim to collect rich, meaningful data that aligns with their research objectives [9]. Well-chosen methods used alongside strategies such as triangulation can enhance the credibility and depth of a study, allowing researchers to construct a comprehensive picture of the phenomenon under investigation [10, 11].

This paper does not aim to propose new theories of qualitative research but instead offers a concise synthesis of established practices and literature to guide researchers in educational contexts. An extensive bibliography has been included to position this discussion within the broader field and to support readers seeking deeper engagement with methodological texts.

By highlighting practical applications, strengths, and challenges, this article aims to advance educational research by equipping scholars with the foundational knowledge required to select appropriate qualitative tools. It also underscores the importance of triangulation in qualitative research to enhance credibility and trustworthiness [12, 13].

# 2 Triangulation in qualitative research

Triangulation refers to the use of multiple data sources, methods, or theoretical perspectives to study a single phenomenon, thereby increasing the credibility and validity of research findings [13, 14]. In qualitative research, triangulation may involve combining interviews, focus groups, and observations to corroborate evidence from different perspectives [11]. This approach reduces the likelihood of researcher bias and helps uncover inconsistencies or contradictions in the data, ultimately producing a richer and more balanced understanding of the research topic [13]. In educational research, triangulation is especially valuable when exploring complex social settings, such as classrooms, where individual perspectives and observed behaviours together create a fuller picture of teaching and learning processes [15].

# 3 Interviews in qualitative research

Interviews are one of the most widely used methods for data collection in qualitative research. This enables researchers to explore the perspectives, experiences, and meanings of participants in depth. Unlike structured surveys or questionnaires, qualitative interviews are flexible, allowing researchers to probe more deeply into topics that arise during conversations [3, 4]. According to Roulston (2010) [16], interviews serve as a bridge between researchers and participants, offering insights into how individuals construct their understanding of the world. By engaging in dialogue, researchers can gather rich descriptive data that contributes to the study of human behaviour, beliefs, and social interactions.

## 3.1 Types of interviews

Interviews in qualitative research can be categorised into three main types: structured, semi-structured, and unstructured. Each type varies in terms of structure, flexibility, and the extent to which the interviewer can deviate from predefined questions. The choice of interview type depends on the research objectives, the depth of information required, and the level of flexibility needed to explore emerging themes.

### 3.1.1 Structured interviews

Structured interviews are highly standardised, following a pre-determined set of questions that are asked in the same order for all participants. This format ensures consistency across interviews, making it particularly useful for comparative studies in which responses need to be analysed systematically [15]. Structured interviews are often used in large-scale qualitative studies, mixed-methods research, and studies that require high reliability. For example, in a study examining teachers' perceptions of curriculum reforms, a structured interview ensures that all respondents answer the same set of questions, facilitating direct comparisons.

Although structured interviews provide consistency and make data analysis more straightforward, they have limitations. The rigid nature of structured interviews can prevent participants from fully expressing their thoughts and experiences beyond predetermined questions [3]. Additionally, this format does not allow researchers to dig deeper into unexpected themes or clarify ambiguous responses, potentially limiting the richness of data [17, 18].

### 3.1.2 Semi-structured interviews

Semi-structured interviews strike a balance between standardisation and flexibility. In this format, researchers prepare a set of guiding questions but allow open-ended discussions and follow-up enquiries based on participants' responses. This approach enables researchers to explore specific themes while adapting to the natural flow of conversations [19, 20].

One of the primary advantages of semi-structured interviews is their ability to provide depth and comparability [21]. While core questions ensure that all participants address key themes, flexibility allows interviewers to probe deeper into areas of interest, seek clarifications, and explore unexpected insights [22]. Thus, semi-structured interviews are one of the most widely used qualitative research methods. For example, in a study of student experiences in higher education, a semi-structured interview would allow researchers to explore common themes, such as academic challenges and support systems, while also uncovering individual experiences that were not initially anticipated.

Despite its advantages, semi-structured interviews require skilled interviewers who can maintain a balance between following the interview guide and allowing organic discussions to unfold. Researchers must also be aware of time constraints, as follow-up questions can sometimes lead to lengthy conversations that extend beyond the planned interview duration [3].

#### 3.1.3 Unstructured interviews

Unstructured interviews offer the highest degree of flexibility, resembling a natural conversation rather than a formal question-and-answer session. In this format, the interviewer does not follow a rigid set of questions but engages the participant in an open-ended discussion based on broad themes or topics of interest [23]. Unstructured interviews are particularly valuable for exploring complex personal narratives, emotions, and lived experiences that may not fit within the confines of structured questioning. This type of interview is commonly used in ethnographic research, life history studies, and exploratory research, in which researchers aim to gain deep insights into participants' perspectives without imposing predefined categories. For example, a researcher studying the experiences of refugees can use unstructured interviews to allow participants to narrate their journeys, struggles, and aspirations in their own words without being confined by a rigid interview structure [24].

However, unstructured interviews have several challenges. They require highly skilled interviewers who can maintain the flow of conversation while ensuring that the key topics are covered. Additionally, because responses vary significantly between participants, data analysis can be complex and time-consuming because researchers must identify patterns and themes within diverse narratives. Another limitation is the potential for interviewer bias, as the direction of conversation can be influenced by the interviewer's reactions, follow-up questions, or personal interpretations [25].

# 4 Conducting an effective interview

To ensure that interviews yield meaningful and reliable data, researchers must carefully plan and execute the interview process. Conducting effective interviews requires strategic preparation, strong interpersonal skills, and adherence to ethical considerations. A well-executed interview creates an environment in which participants feel comfortable sharing their thoughts and experiences, leading to rich and insightful qualitative data. Key aspects of effective interviewing include developing an interview guide, building rapport with participants, actively listening, and ensuring proper recording and transcription of data.

## 4.1 Developing an interview guide

Even in semi-structured or unstructured interviews, an interview guide serves as a valuable tool to maintain a focus on key themes while allowing flexibility in participant responses [11]. The interview guide typically includes broad topics and open-ended questions that encourage participants to elaborate on their experiences. For example, in a study on teacher experiences in classroom management, an interview guide may include questions such as, *'Can you describe a challenging classroom situation and how you handled it?'* or *"What strategies do you find most effective in managing student behaviour?'*

The interview guide also ensures consistency across multiple interviews, especially in semi-structured formats, where core themes must be addressed while allowing room for spontaneous discussions. Additionally, researchers should pilot-test their interview questions with a small group of participants to refine the language, eliminate ambiguity, and assess the effectiveness of their questions in eliciting relevant responses [26, 27].

## 4.2 Building rapport

Establishing trust and rapport with participants is crucial in qualitative interviews, as it influences the depth and authenticity of the responses. When participants feel comfortable and respected, they are more likely to share honest and detailed accounts of their experiences [28]. Building rapport begins with setting a welcoming tone, explaining the purpose of the study, and reassuring participants about confidentiality and ethical considerations. Non-verbal cues, such as maintaining eye contact, using open body language, and nodding in acknowledgement, can also enhance the sense of connection and trust [29].

In addition, interviewers must demonstrate cultural sensitivity, respect the backgrounds of participants, and create a judgment-free environment in which individuals feel safe when expressing their views. For example, when interviewing marginalised groups, it is essential to acknowledge their lived experiences and ensure that the interview process empowers them rather than intimidating them [30]. The ability to establish relationships is particularly important in sensitive research areas, such as trauma, mental health, or discrimination, where participants may feel vulnerable.

## 4.3 Active listening

Effective interviews require more than just asking questions; they also require active and engaged listening. Active listening involves fully concentrating on participants' responses, interpreting their meanings, and responding in ways that encourage further elaboration [31]. This includes using follow-up questions or prompts such as 'Can *you tell me more about that?'* or *'How did that experience shape your perspective?'* in order to deepen the discussion.

Researchers must also be aware of non-verbal signals, such as tone of voice, pauses, and emotional expressions, as they can provide additional insight into participants' feelings and experiences [32]. For example, if a participant hesitates before answering a question about workplace discrimination, it may indicate discomfort or a reluctance to disclose sensitive details. In such cases, researchers must navigate the conversation with empathy, offer reassurance, and allow participants to set their own pace.

One challenge in active listening is avoiding interruptions or leading a conversation in a predetermined direction. Interviewers should refrain from imposing their own interpretations or making assumptions, allowing participants' narratives to unfold naturally. Skilled interviewers strike a balance between guiding the discussion and giving participants space to express themselves freely [33].

## 4.4 Recording and transcribing

Accurate data collection in qualitative interviews requires proper recording and transcription. Most researchers use audio recording devices or digital applications to capture conversations, ensuring that no details are lost. Recording allows researchers to focus on interactions rather than taking extensive notes, which can disrupt the flow of conversations [34]. However, before recording, it is essential to obtain informed consent from the participants and to clearly explain how the data will be used, stored, and protected.

Transcription, the process of converting audio recordings into written text, is a critical step in interview analysis. Researchers must decide the level of detail required in the transcription process. Verbatim transcription captures every word, including pauses, laughter, and nonverbal expressions, making it useful for discourse analysis and studies focusing on language patterns. Edited transcriptions, on the other hand, may exclude filler words and minor repetitions, producing a more readable text without altering the meaning of the responses [35].

Transcription can be time-consuming, particularly for long interviews, but the use of transcription software and AI-assisted tools can help streamline the process. However, automated transcription tools may still require manual verification to ensure accuracy, particularly when dealing with complex terminology, accents, or multiple speakers. Researchers must also consider ethical concerns, such as anonymising transcripts to protect participant identities and securely storing data to prevent unauthorised access [36].

## 4.5 Advantages and challenges of interviews

### 4.5.1 Advantages of interviews

Interviews offer several advantages in qualitative research, making them a valuable tool for in-depth exploration of participants' perspectives. One of the primary strengths of interviews is their ability to provide rich and detailed insights into individuals' thoughts, experiences, and emotions [37]. Unlike standardised surveys or questionnaires, interviews allow researchers to ask open-ended questions and encourage participants to elaborate on their responses. Tracy

(2024) [1] highlighted that this depth of exploration helps researchers uncover nuances that may not be captured through other data collection methods. In addition, interviews offer flexibility in questioning, allowing researchers to adapt their enquiries based on the direction of conversation. This flexibility is particularly beneficial when unexpected themes emerge, allowing researchers to further investigate and gain a deeper understanding of the topic.

Another significant advantage of the interviews is their ability to capture non-verbal cues and emotional expressions, which can add further context to the responses. Facial expressions, tone of voice, and body language can reveal underlying emotions that may not be explicitly stated in verbal responses [32]. For example, a participant's hesitation, enthusiasm, or discomfort can provide additional layers of meaning for their spoken words. This aspect of interviews makes them particularly useful in studies exploring sensitive topics where emotions play a crucial role in understanding participants' experiences. By observing these subtle cues, researchers can gain a more comprehensive understanding of participants' perspectives, enriching the quality of the data collected.

### 4.5.2 Challenges of interviews

Despite their advantages, interviews also present several challenges that researchers must consider. One of the primary difficulties is the time-consuming nature of this process. Conducting in-depth interviews, transcribing conversations, and analysing data requires significant time and effort [38]. McMullin (2021) [35] notes that transcription alone can be particularly labour-intensive, as it involves converting spoken words into written text, often requiring repeated listening to ensure accuracy. This process also includes taking affective notes, documenting the researcher's emotions and impressions during and after the interview, which adds another layer of complexity to data collection. Qualitative data analysis involves identifying themes, coding responses, and interpreting findings, which can be a lengthy and complex process. The time-consuming nature of interviews makes them less feasible for large-scale studies, in which multiple participants must be interviewed.

Another challenge associated with interviews is the potential for interviewer bias, which can influence the participants' responses. Interviewer bias occurs when the researcher's expectations, assumptions, or mannerisms shape the way questions are asked or how responses are interpreted [3]. Mathers et al. (1998) [39] emphasise that even subtle cues, such as the tone of voice or facial expressions of the interviewer, can unconsciously guide participants toward certain answers. This brings to light the issue of positionality, the need for researchers to critically reflect on their own identities, backgrounds, and assumptions and how these may influence the research process. To minimise this risk, researchers must adopt a neutral and non-judgmental approach, ensuring that their presence does not unduly influence participants' responses. Proper training and self-awareness are essential for interviewers to remain objective and avoid leading questions that could shape the data.

Furthermore, interviews may also be affected by social desirability bias, in which participants respond that they believe are socially acceptable rather than their true thoughts or experiences [40]. This is particularly common when discussing sensitive topics, as participants may fear judgment or the consequences of their answers [41]. For example, in studies on workplace ethics, participants might exaggerate their adherence to ethical practices to present themselves in a favourable light. To address this issue, researchers must build rapport with the participants, ensure confidentiality, and formulate questions to encourage honesty. Providing a safe and non-threatening interview environment can help reduce social desirability bias and encourage participants to share genuine perspectives.

# 5 Focus groups in qualitative research

Focus groups are a widely used method of qualitative data collection, which involves gathering a small group of participants to discuss a particular topic under the guidance of a moderator. Unlike individual interviews, focus groups leverage group dynamics to generate discussions and encourage participants to build on each other's ideas and experiences [42, 43]. This interaction allows researchers to gain insights into collective meanings, social norms, and shared perspectives that may not emerge in one-on-one conversations [44].

According to Creswell and Poth (2018) [45], focus groups are particularly useful for exploring attitudes, opinions, and behaviours that are influenced by social contexts. They provide a unique opportunity to observe how individuals react to and influence each other within a discussion setting, making them valuable for studying group-based decision making and cultural interpretations.

### 5.1 Characteristics of focus groups

A typical focus group comprises six to eight participants who share common characteristics relevant to the research question, such as similar demographics, experiences, or interests [42]. The discussion is facilitated by a trained moderator who ensures that the conversation remains focused while allowing participants the freedom to express their thoughts openly. The moderator's role is crucial in guiding the discussion, balancing participation, and preventing any individual from dominating the conversation [43]. Focus groups are structured around open-ended questions that encourage dialogue, but remain flexible, allowing for emergent themes and unexpected insights [46].

The focus group setting fosters interactive discussions, which can be particularly beneficial in uncovering attitudes that participants may not have articulated in individual interviews [42]. This interaction can lead to new ideas, as participants may be influenced by others' perspectives or recall experiences that they might not have mentioned otherwise. Additionally, focus groups allow researchers to observe non-verbal communication, such as body language, facial expressions, and gestures, which can provide deeper insights into participants' emotions and reactions [47].

### 5.2 Advantages of focus groups

A key advantage of focus groups is their ability to capture diverse viewpoints in a single session, making them efficient and rich in content [5,43]. Unlike individual interviews, which capture one viewpoint at a time, focus groups facilitate the exchange of ideas, thus revealing shared and contrasting opinions. Stewart and Shamdasani (2014) [43] emphasise that this interactive process often leads to deeper insights as participants challenge, support, or elaborate on each other's statements. The group setting can also stimulate memory recall, prompting participants to share experiences that they might not have considered in a one-on-one interview.

Another significant advantage is the efficiency of focus groups in collecting data from multiple participants simultaneously. While individual interviews require separate sessions for each respondent, a focus group allows researchers to gather inputs from several participants in a single discussion, making this a time-effective method [42]. This can be particularly useful in studies with short timelines or limited resources. Furthermore, focus groups provide researchers with a platform to explore how social and cultural influences shape opinions and behaviours, which are especially important in fields such as marketing, education and public health [43].

Focus groups also encourage natural conversations that can lead to the spontaneous emergence of new themes [48]. Unlike surveys or structured interviews, where responses are often predetermined by the researcher's questions, focus groups allow for organic discussions, enabling researchers to uncover insights that they may not have anticipated. This flexibility makes them an ideal method for exploratory research, in which the goal is to understand how people think and talk about particular issues [42].

### 5.3 Challenges of focus groups

Despite their strengths, focus groups present several challenges that researchers must navigate carefully. One of the most common difficulties is managing group dynamics. In any group discussion, some individuals may be more vocal, whereas others may hesitate to share their perspectives [49]. If dominant participants control the conversation, quieter individuals may not feel comfortable expressing their views, leading to an imbalance in the data. Fern (2001) [50] stressed that moderators must be skilled in facilitating inclusive discussions, ensuring that all participants have the opportunity to contribute. They could achieve this by actively encouraging quieter participants, redirecting the conversation when necessary, and setting clear expectations at the beginning of the session.

Another major challenge is the potential for social desirability bias. In a group setting, participants may feel pressured to conform to the opinions of others, rather than express their true thoughts [46]. This is particularly likely in discussions on sensitive topics, where individuals may be reluctant to voice dissenting views for fear of judgment. To mitigate this risk, researchers should create a supportive and non-judgmental environment that emphasises confidentiality and the importance of honest responses [42]. The moderator's approach is crucial in setting the tone, ensuring that participants feel comfortable sharing their perspectives without fear of criticism [43].

The logistics of organising focus groups can also be complex. Identifying a suitable time and location that accommodates all participants can be challenging, particularly in studies involving busy professionals or geographically dispersed individuals [43]. Virtual focus groups, conducted through online platforms, offer a solution but come with their own limitations, such as difficulties in managing discussions, technical issues, and inability to observe full-body language cues [51]. Researchers must carefully weigh these factors and select the most appropriate format for their studies.

## 5.4 Ethical considerations in focus groups

Like all qualitative research methods, focus groups require careful attention to ethical considerations. A key ethical issue is to ensure informed consent. Participants must be fully aware of the purpose of the study, how their data will be used, and any potential risks associated with participation [52]. Unlike individual interviews, in which confidentiality is easier to maintain, focus groups involve multiple participants, making it more challenging to ensure privacy [53]. Researchers should establish ground rules at the beginning of the session, highlighting that discussions should remain confidential, and that participants should respect each other's privacy.

In addition, researchers must be mindful of the potential power imbalance within a group. When participants come from different social or professional backgrounds, certain individuals may feel intimidated or hesitant to share their perspectives. Moderators must be sensitive to these dynamics to create an environment in which all voices are valued and respected [54]. Ensuring that participation is voluntary and that individuals can withdraw at any time is essential in upholding ethical research practices [8].

## 5.5 Observation in qualitative research

Observation is a fundamental method of qualitative data collection that involves systematically watching, listening to, and recording behaviours, interactions, and events in natural settings [55]. Unlike interviews or focus groups, which rely on participants' verbal responses, observation allows researchers to gather data on actual behaviours, social interactions, and environmental contexts [6]. This method is particularly valuable for studying phenomena that may not be easily articulated by participants or for capturing non-verbal cues that contribute to a deeper understanding of human behaviour [8]. Observations are widely used in ethnographic research, case studies, and fieldwork to provide rich contextual insights into social and cultural practices [56].

## 5.6 Types of Observation

Observation in qualitative research can take various forms, depending on the level of researcher involvement and the structure of data collection [57]. Researchers choose observation methods based on the research objectives, nature of the study setting, and level of interaction required by participants. The two primary types of observations are participant and non-participant observations, each with its own advantages and limitations [58]. Additionally, observations may be structured or unstructured depending on whether data collection follows a systematic protocol or is guided by an open-ended, emergent enquiry [15].

### 5.6.1 Participant observation

In participant observation, the researcher actively engages in the setting in which they are studying, assuming the role of an insider while simultaneously collecting data. This approach enables researchers to experience the environment first and gain deep insight into cultural norms, group dynamics, and behavioural patterns [56]. Participant observation is commonly used in ethnographic research, in which researchers immerse themselves in a community or organisation for an extended period [40]. For example, a researcher studying the daily routines of healthcare workers in a hospital may shadow doctors and nurses, observe interactions with patients, and participate in informal discussions to understand their lived experiences.

One of the key benefits of participant observation is that it allows researchers to develop a rich and contextual understanding of human behaviour, as it naturally occurs. By becoming part of this setting, researchers can uncover implicit social norms, underlying motivations, and the meanings that participants attach to their actions [59]. However, participant observation presents several challenges. One of the main concerns is maintaining objectivity, as prolonged engagement in the environment can lead researchers to develop personal biases or become too immersed in the group's perspective [60]. Additionally, the mere presence of the researcher might alter participants' behaviours, known as the observer effect, where individuals modify their actions because of being observed [57].

### 5.6.2 Non-participant observation

Nonparticipant observation involves researchers adopting a detached role in the setting they are studying. They observe and record events as they unfold without directly engaging with the participants. This method is useful in situations in which researchers aim to minimise their influence on observed behaviours, ensuring that participants act naturally [6]. For instance, in a study analysing teacher-student interactions, a researcher could sit at the back of the classroom, discreetly taking notes on communication styles, student engagement, and instructional strategies without intervening in the lesson.

A significant advantage of nonparticipant observation is that it reduces the likelihood of the researcher's influence on participants' behaviours, thus enhancing the validity of the findings [56]. It is particularly useful in settings where direct involvement could compromise the authenticity of the data, such as in studies of workplace dynamics or consumer behaviour in retail environments. However, nonparticipant observations have certain limitations. Since researchers do not engage with participants, their understanding of observed behaviours may be limited to surface-level interpretations. Unlike participant observation, in which researchers can clarify meanings through direct interaction, non-participant observation relies solely on what is externally visible, which may result in incomplete insight [6].

### 5.6.3 Structured and unstructured observation

Observations can also be classified according to the degree of the preplanned data collection structure. Structured observation follows a systematic approach in which researchers use predefined checklists, coding schemes, or observation protocols to record specific behaviours or events [45]. This method ensures consistency and comparability between multiple observations, making it suitable for studies that require quantitative data analysis [61]. For example, a researcher studying classroom interactions may use a structured observation protocol to count instances of teacher praise, corrective feedback, and student engagement behaviours. Structured observation improves reliability by ensuring that observations are recorded in a uniform manner, but may overlook spontaneous or unexpected occurrences that do not fit predefined categories [62].

By contrast, unstructured observations allow for a more flexible, open-ended approach to data collection. Researchers do not rely on predefined criteria but instead take detailed field notes on any aspects of the setting that seem relevant [45]. This method is particularly useful in exploratory research, where the goal is to generate insights rather than quantify behaviours. For example, an anthropologist studying community life in a rural village may engage in unstructured observations to document interactions, traditions, and daily routines without a strict observation framework. The strength of unstructured observations lies in their ability to capture rich contextual data, including unexpected or emergent themes that structured methods may miss [62]. However, the lack of standardisation can make data analysis more challenging, as researchers must identify patterns and themes from a vast number of descriptive notes [63].

## 5.7 Advantages and challenges of observation

### 5.7.1 Advantages of observation

Observations have several advantages that make them valuable for qualitative research. One of its primary strengths is that it enables researchers to collect data on actual behaviours rather than relying on self-reported information [62]. People may not always accurately describe their own actions, especially on sensitive topics where social desirability bias may influence responses. By directly observing behaviours, researchers can gather more reliable and authentic data [62].

Another advantage of observation is its ability to capture contextual factors that may shape behaviours and interactions [64]. Unlike interviews, which focus on individual perspectives, observations allow researchers to examine how people behave in real-world settings. For example, in a study of classroom learning, observations can provide insights into teacher-student interactions, classroom management strategies, and the physical arrangement of the learning environment. These contextual elements can offer a more comprehensive understanding of the research topic than can self-reported data alone [45].

Observations also enable researchers to collect non-verbal data, such as body language, facial expressions, gestures, and spatial arrangements. These nonverbal cues can provide important information on participants' emotions, social hierarchies, and interpersonal relationships [65]. For example, in workplace studies, observation of employee interactions can reveal power dynamics, informal communication patterns, and team cohesion, which might not be explicitly discussed in interviews [6].

Furthermore, observations allow researchers to study events in their natural sequences, thereby capturing spontaneous actions and interactions as they unfold [15]. This can be particularly valuable in studies on behaviour change, social interactions, or group dynamics, where understanding the flow of events is essential. Unlike retrospective interviews, which rely on memory recall, observations provide real-time data that is not subject to memory distortions or selective reporting.

#### 5.7.2 Challenges of observation

Despite its strengths, observations present several challenges that researchers must navigate cautiously. One of the most significant challenges is the researcher bias [66]. The act of observation is inherently subjective, and researchers' interpretations of behaviours may be influenced by their own perspectives, cultural backgrounds, or expectations. To mitigate bias, researchers should use detailed field notes, audio, or video recordings and, when possible, multiple observers to crosscheck interpretations [6]. Furthermore, maintaining reflexivity, whereby researchers critically reflect on their role and potential influence on the data-collection process, can help enhance the credibility of observational research [67].

Another challenge is the observer effect, also known as the Hawthorne effect, in which participants alter their behaviour because they are aware that they are being observed [15]. In some cases, individuals may act in ways that they perceive as socially desirable or modify their natural behaviours in the presence of the researcher. This could compromise the authenticity of the collected data. Researchers can minimise this effect by spending extended periods in the field so that participants become accustomed to their presence, leading to more natural behaviour over time [15].

Ethical considerations also play a crucial role in observational studies. Unlike interviews, in which participants provide explicit consent before sharing information, observation may involve studying people in public or semi-private settings, where obtaining consent from all individuals can be challenging [45]. Researchers must balance the need for ethical transparency with the feasibility of obtaining informed consent, particularly in natural settings. In cases where observations are conducted in private or sensitive contexts, ethical approval from institutional review boards (IRBs) is necessary to ensure that participant rights and confidentiality are protected [8].

Another limitation of observation is that some phenomena are not easily observable. Internal cognitive processes, personal experiences, and private conversations cannot be directly observed, which may require researchers to supplement observational data with interviews or document analysis [68, 69]. Additionally, in fast-paced environments, it may be difficult for researchers to capture every detail in real-time, leading to potential gaps in data collection. Using audio or video recordings, where appropriate and ethically permissible, can help address this challenge by allowing for more detailed post-observation analysis [70].

## 6 Document analysis in qualitative research

Document analysis is a qualitative research method that involves systematic examination and interpretation of documents to gain insight into a specific phenomenon. It is widely used in social sciences, education, public policy, and historical research to analyse written, visual, or digital materials that provide evidence of social, cultural, institutional, or personal experiences [71]. Unlike interviews and observations, which require direct interaction with participants, document analysis relies on preexisting materials, making it a non-intrusive and cost-effective method of data collection [72]. Documents can serve as primary or supplementary data sources, helping researchers corroborate findings from other qualitative methods or explore topics that may not be accessible through direct interactions with participants [1].

### 6.1 Types of documents in qualitative research

Documents used in qualitative research can be categorised into three main types: public, personal, and institutional [15]. Each type serves a different research purpose and provides unique information regarding social, historical, and cultural phenomena. Document analysis allows researchers to examine written, visual, or digital materials to gain a deeper understanding of human experiences, organisational structures, and policy development. Since documents are often produced for purposes other than research, they offer naturally occurring data that can complement interviews, focus groups, and observations.

#### 6.1.1 Public documents

Public documents include government reports, policy papers, newspapers, organisational records, official speeches, and archival materials. These documents are widely accessible and are often used to study historical trends, policy developments, and broader social changes over time [7]. For example, researchers who analyse government publications can track shifts in political priorities, economic policies, and legal reforms. A study of education reform may involve examining national curriculum policies, education budget reports, or ministerial speeches to assess how priorities in schooling have evolved over the decades [15]. Similarly, newspaper articles and media reports can provide insights into public discourse, shaping how particular events and social issues are framed in society. One advantage of public documents is that they offer official and verifiable information that can be used to support or contrast findings with other qualitative methods [7]. However, researchers must remain critical as these documents may reflect institutional or political biases that influence the way information is presented [7].

#### 6.1.2 Personal Documents

Personal documents include diary entries, letters, autobiographies, photographs, blogs, and posts on social networks. These documents provide intimate insights into the lived experiences, emotions, and perspectives of individuals [8]. Unlike official public records, personal documents are often written for private purposes, making them rich sources of qualitative data that reveal personal history and subjective narratives. For example, researchers studying migration experiences can analyse letters and diaries of immigrants to understand their struggles, adaptation processes, and emotional journeys [8]. Similarly, analysing social media content, such as personal blog posts, Twitter threads, or Facebook comments, can help researchers explore contemporary social issues, public opinions, and digital communication trends.

Although personal documents provide deep, first-hand accounts of experiences, they also pose challenges related to authenticity, reliability, and potential bias. As these documents reflect individual viewpoints, they may not always present a complete or objective account of events [73]. Researchers must carefully assess the context in which personal documents are created and consider multiple sources to gain a balanced understanding. Furthermore, ethical considerations, such as obtaining permission to analyse personal writing or social media content, must be considered [74].

#### 6.1.3 Institutional documents

Institutional documents include organisational reports, meeting minutes, internal communications, employee handbooks, training manuals, and policy guidelines. These documents are particularly valuable in organisational, educational, and policy research, as they provide insights into institutional practices, power structures, and decision-making processes [75]. For example, a study on school governance may involve analysing school board meeting minutes to understand how decisions about curriculum implementation, teacher recruitment, and student discipline are made [76]. Similarly, researchers examining workplace culture may review company policies and internal reports to investigate issues, such as diversity, employee well-being, and leadership practices.

Institutional documents serve as authentic and stable sources of data as they often contain official records that reflect organisational priorities and operational frameworks. However, one limitation is that these documents are typically produced for internal use rather than public scrutiny [72]. Consequently, they can be influenced by institutional agendas and can present a controlled or selective version of reality [15]. Researchers who analyse institutional documents must consider what is included, what is omitted, and how the purpose might shape their content.

### 6.2 Process of document analysis

Document analysis follows a structured process that involves identifying relevant documents, evaluating their authenticity and credibility, coding data, and interpreting the findings. The first step is to identify and select documents relevant to the research questions. Researchers must define clear criteria for document selection to ensure that the materials agree with the study objectives [77]. This may involve searching for archives, organisational records, online databases, or requesting documents from institutions [72]. It is essential to verify the accessibility and ethical considerations of using certain documents, particularly when dealing with sensitive or confidential materials [78].

Once documents have been collected, the next step is to evaluate their authenticity, credibility, and reliability. Authenticity refers to whether a document is genuine and free of alterations, whereas credibility assesses the trustworthiness and accuracy of content [62]. Researchers must consider the purpose and context in which a document is created, as biases or agendas can influence the information presented [7]. For example, a corporate report on workplace diversity may present an idealised view rather than an objective account of an organisation's inclusivity efforts. Triangulating document analysis with other data collection methods, such as interviews or observations, can help validate findings and reduce bias [79].

The third step involves coding and categorising the data. Researchers systematically analyse the content of documents by identifying themes, patterns, and key concepts. This may involve manual coding, where researchers highlight significant text segments or use qualitative data analysis software, such as NVivo or ATLAS.ti, to organise and analyse large volumes of documents efficiently [80]. Coding helps structure the data, making it easier to draw meaningful interpretations and link findings to broader theoretical frameworks [8].

Finally, the interpretation of the findings involves synthesising the extracted information to answer the research questions. This process requires a deep understanding of the context, language, and underlying meanings of the documents. Unlike statistical analysis, which focuses on numerical patterns, qualitative document analysis aims to uncover the narratives, values, and ideologies embedded within a text [81]. For example, analysing speeches by political leaders may reveal recurring themes of nationalism, globalisation, or economic priorities that shape public policies [15].

## 6.3 Advantages of document analysis

One of the primary advantages of document analysis is that it is non-intrusive and does not require direct interactions with participants. This makes it particularly useful in studies where participant involvement is not feasible, or where researchers seek to minimise disruptions in natural settings [7]. For example, studying historical changes in gender representation in textbooks can be done solely through document analysis, without requiring input from authors or publishers.

Another key advantage is the availability of documents, which is a rich source of historical and contextual data. Unlike interviews and observations, which capture data in real time, documents provide access to past events, policies, and narratives [9]. This makes document analysis particularly valuable for longitudinal studies examining changes over time. For instance, researchers studying educational reforms can analyse policy documents from different decades to track shifts in pedagogical approaches and curriculum priorities [9].

Document analysis is also cost-effective and time-efficient compared to other qualitative methods. Because documents are already produced and readily available in many cases, researchers can save time and resources that would otherwise be spent on data collection. Additionally, documents often contain well-structured information, reducing the need for extensive data transcription, which is required in interview-based research [8].

## 6.4 Challenges of document analysis

Despite its advantages, document analysis also presents several challenges. One of the primary challenges is assessing the authenticity and credibility of the documents. Not all documents provide accurate or unbiased accounts, and researchers must critically evaluate the sources and potential biases of the materials analysed. For example, media reports may reflect editorial biases, whereas corporate reports may selectively highlight positive achievements while downplaying challenges [7].

Another limitation is the potential incompleteness of the documents. Some documents may lack critical details, making it difficult to fully understand the context or meaning of the content. For example, analysing meeting minutes may provide insight into key decisions but may not capture informal discussions or power dynamics that influence those decisions. To fill these gaps, researchers may need to supplement document analysis with interviews or observations [15].

Access to documents can also be restricted, particularly when dealing with confidential or proprietary information. Some organisations may be unwilling to share internal reports or historical records, limiting the ability of researchers to obtain comprehensive data. Ethical considerations also come into play when analysing personal documents, as privacy concerns may arise when dealing with diaries, letters, or social media content. Researchers must ensure that they obtain proper permission and adhere to ethical guidelines when using sensitive materials [8].

# 7 Conclusion

Qualitative research provides rich, in-depth insights into human experiences, social interactions, and cultural contexts by drawing on a range of complementary data-collection methods. This paper has explored four widely used qualitative methods: interviews, focus groups, observation, and document analysis, each offering unique contributions to the understanding of complex phenomena.

The interviews provide a direct and personal approach to understanding the thoughts, emotions, and lived experiences of the participants. They allow researchers to delve deeply into individual perspectives, thus allowing flexibility in probing responses and exploring emerging themes. However, interviews require skilful questioning, active listening, and careful rapport building to minimise interviewer bias and elicit genuine responses. Additionally, the transcription and analysis process can be time-consuming, requiring researchers to systematically interpret and categorise responses while maintaining the authenticity of participants' voices.

Focus groups, on the other hand, offer an interactive setting where participants exchange ideas and react to each other's viewpoints, leading to a more dynamic exploration of collective perspectives. This method is particularly valuable in studies that seek to understand group norms, social influences, and shared experiences. However, focus groups require careful moderation to prevent dominant voices from overshadowing quieter participants and ensure that all perspectives are heard. The effective management of group dynamics is essential for capturing diverse insights while maintaining an open and respectful discussion environment.

Observations provide a unique opportunity to study behaviours, interactions, and environmental contexts in real-time. Unlike interviews and focus groups that rely on self-reported data, observations allow researchers to directly witness how people behave in their natural settings. This method is particularly valuable for studying social interactions, cultural practices, and institutional routines. However, observations present challenges, such as potential observer bias, ethical concerns regarding privacy, and the difficulty of interpreting non-verbal cues without imposing subjective interpretations. Balancing researcher involvement, whether through participant or non-participant observation, also influences the nature and depth of the data collected.

Document analysis offers a non-intrusive method for examining historical and contemporary records, policy documents, institutional reports, personal writings, and media sources. This approach provides valuable contextual information, particularly when studying past events, organisational policies, or cultural narratives. Unlike interviews and observations, which require direct interaction with participants, document analysis relies on existing materials, making it a useful method for retrospective studies or cases in which direct access to participants is limited. However, researchers must carefully assess the authenticity, credibility, and potential biases of documents to ensure that the selected materials accurately represent the phenomenon being studied.

Each of these qualitative data collection methods has its own set of challenges, including time constraints, ethical considerations, researcher subjectivity, and access limitations. No single method is universally superior; rather, the choice of method depends on the research question, study objectives, and context of the investigation. To enhance research validity and depth, qualitative studies often adopt a triangulation approach that combines multiple methods to cross-validate the findings and provide a more comprehensive understanding of the phenomenon under investigation. For example, researchers may complement interviews with document analysis to compare first-hand narratives with institutional records, or they may use observations alongside focus groups to gain a richer understanding of social interactions.

By carefully selecting, integrating, and applying these qualitative methods, researchers can produce meaningful and well-substantiated findings that can contribute to academic knowledge and practical applications. The flexibility and depth of qualitative research make it a powerful approach for studying human experiences, informing policy decisions, and advancing understanding in diverse fields. As qualitative research continues to evolve, advances in technology, digital data sources, and ethical frameworks will shape how researchers collect, interpret, and present qualitative data.

# Conflicts of interest

The author declares no conflict of interest.

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