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Qualitative Methodologies

This chapter is the presentation of the main characteristics of qualitative research so as to highlight its approaches and goals. A specific focus on the use of the interview in qualitative research is developed. Issues related to preparing and carrying out a semi-structured interview are presented. Two forms of analysis of interview-collected data are presented.
Keywords: qualitative research, interviews, semi-structured interview, content analysis, thematic analysis

Introduction

This chapter is a text on methodological aspects of qualitative research in social sciences, namely on the use of the semi-structured interview. As such, it should be read as a text on procedures, supplying guidelines as to ways of carrying out data collection and data analysis that could be useful (and used) by researchers interested in any of the topics that constitute the main contribution of this book.

Qualitative Research: approaches and goals

When conducting a scientific inquiry, it is the research focus (the so-called central research question) that defines the suitable method to use. In striving to familiarise ourselves with social, political and cultural phenomena related to security, resilience and sustainability in the European Union, we aim at obtaining scientifically grounded, systematic knowledge.

For instance, if population attitudes on security threatening illegal migration are at stake, a large-scale standardised survey seems to be both an appropriate research design and data collecting tool. However, it is hard to design a good survey without it being preceded by field observations or interviews on the topic. The latter would help designing a useful (i.e. research goals-effective) questionnaire, by helping designing the themed units and respective questions.

Although big data and statistical analyses are overwhelmingly present in the scientific field, there are more methods to be chosen from. Let us suppose a scholar aims at studying the environment-related behaviour of children, such as, for instance, behaviour in the school playground during recess periods. An on-site observation would definitely be an appropriate method to use. Another typical topic of field research is deviant behaviour, which is difficult to inquire about directly, from the people involved. A researcher can choose to approach such a discrete topic by making on-site observations. Other than that, should someone be interested in the motivations of middle-aged people to participate

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in cancer screenings, s/he/they would be advised to conduct either one-on-one or focus group interviews with a sample from the target population. On the other hand, stakeholders' messages are best approached via discourse analysis, whereas fake news on internet sites can be more fruitfully analysed via content analysis.

According to Burnard (1995), whatever qualitative method chosen, the researcher's self-reflection is the qualitative research's distinctive feature. Unlike quantitative methods that aim at producing number-based expressions of social phenomena (the latter being, more often than not, segmented in its take by the researcher), qualitative research strives to obtain a more meaning and narrative-based understanding of social reality, taking it, overall, in a more holistic approach when compared to quantitative approaches. The need for a statistically representative sample is not a central issue in qualitative analysis, and usually a relatively small size, non-probabilistic sample can be used as a base for the collection of information. This situation is possible because the data collected aims not at being treated statistically. Qualitative-based methods are thorough and detailed: besides getting to know the attitudes, views and meanings regarding the phenomena to be studied, their emergence, intensity and causal mechanisms are also possible to be known. Also, qualitative research can be both exploratory and explanatory (depending both on the stage and goals of the research), but it will always have an emphasis on descriptive and narrative forms of knowledge.

Nevertheless, it is useful to keep in mind that the use of multiple data collection methods in research (i.e. triangulation) is advisable for any study, and thus, also advisable in the study of social life.

Some common methods in qualitative research

In the paragraph below some qualitative research methods will be presented, which, based on the authors' experience, can be used to address research questions related to the European Union's security and resilience issues. Certainly, there are many more methods to be chosen from, and we advise the readers to supplement their knowledge with further readings.

Some methods of qualitative data collection, like field observations, are direct and on-site, others, like interviews, can be more indirect ways of understanding people's behaviours and attitudes. Methods that imply direct contact between a researcher and a social subject exert some observer effect upon the subjects of study by either the research instrument, the personality of the researcher or the site where the study takes place. On the contrary, research methods that do not require such direct contact use secondary data, and as such, do not influence the social subjects' behaviour to any extent.

Field observation

This ethnographic method is popular for its low cost, however, it is very labour- and time-intensive. The researcher goes on-site to observe and to register the behaviour of people in the space of their social life. Extended time of stay and direct contact by the researcher with the reality under study are hallmarks of this particular form of data collecting.

In this form of data collecting, it is desired that the researcher will acquire some form of participation in the life of the community so as to gain a more in-depth knowledge of the social universe under study. The so-called informants, that is, the insiders from the population to be studied, provide useful information, either through action or words. However, the information thus collected needs careful cross-checking (triangulation). This data collection method often needs inventive and resourceful researchers so as to better integrate into the collectivity they study (Babbie 2020). However, the presence of an observant should always be understood as a situation of social interaction between differentially located social actors: the researcher(s) and the informant(s) who mutually construct the observed social reality. Data gathered on the field is best recorded if immediately written down as field notes, diaries or minutes, so that it is available for detailed analysis at a later time.

Visual-based techniques

Paintings, drawings, photos, hypermedia, films and videos can act as data sources. They are easily accessible, which makes them a popular source of research.

Visual techniques like completion technique, collage/concept boards, mind mapping, graffiti or ideas wall offer an alternative to traditional discussion groups by facilitating the enunciation of opinions. As such, these visual-based resources are efficient in engaging population segments (such as youths or marginalised groups) that can prove difficult in cooperating with the research goals (MacDonald–Headlam 2009).

Usually, visual-based data is treated via content analysis, where either a manifest (surface) or a latent (deep structure) analysis can be performed. The stages involved in content analysis are the decontextualisation, the recontextualisation, the categorisation and the compilation (Bengtsson 2016). Different software helps classify and arrange unstructured information, discover patterns and draw conclusions from the data.

Document analysis

This method of analysis relies on written sources. In the context of the European Union security, resilience and sustainability issues, plausible objects of analysis can be, for instance, the following: Parliament and Commission meetings, summits, public speeches of politicians and stakeholders, press conferences. Minutes of meetings, policies, codes

of practice, newspaper articles, press-releases, books, websites. These sources mostly allow secondary analysis, which is sometimes used as a research method in its own right, but mostly for supplementing other methods like on-site observations, interviews or surveys. Documents provide context, are appropriate means of tracking change, allow the additional verification of results from other sources, and draw the researcher's attention upon questions that need to be asked with further research tools (Bowen 2009). In some cases, such qualitative data will be quantified during analysis, like, for instance, measuring the occurrence of a word or a concept, for instance, in fake news research.

Discourse, as the ensemble of the words pronounced/written, is thus being studied as a text occurring in social practice, and can be approached from a linguistic perspective. The focus of the analysis is the language, the interaction mediator, and emphasis is on the rhetorical and argumentative structure of the text (Silverman 2011). Such elements are then the core matter of the so-called discourse analysis. Applied initially mostly to written texts, it has been used for the analysis of spoken words, i.e. conversations (see below).

The benefits of this type of data collecting and analysis are its low cost (since it does not require high-tech materials or infrastructures), its non-interference with the phenomenon studied, the possibility of dividing the research process into multiple stages and, finally, that coding created can be repeated/used with other similar sources. There are, however, some remarkable disadvantages: it can be very time-consuming, it only allows recorded communication to be studied, and there might be a biased selectivity particularly in the context of organisational research, as documents issued and archived usually align with the policies and the agenda of the organisation (Yin 1994).

The interview in the research of social sciences: Typology and usage

Whether occurring naturally or being planned ahead, interviews-as-conversations are heuristic starting points for qualitative study. Interviews are best used if the research aims at exploring the thoughts and feelings of people, which requires a conversation. A good interview is the intellectual performance of two or more persons, where the interviewer has an inspiring attitude and contributes to the success of the research.

Interviews, taken as conversations, can be classified following different factors. For instance, concerning the nature of the information collected, they can be classified as objectivist interviews that aim at obtaining concrete facts like data from the life course, happenings, views on specific topics, or as emotionalist interviews that strive to collect honest subjective accounts regarding certain experiences like, for instance, childhood school encounters (Ratner 2002).

But interviews, taken as conversations, can also be classified concerning their content and technique used. Thus, we can classify interviews as in-depth, ethnographic and narrative. In general, in-depth interviews contain to a large extent subjectivist elements, whereas narrative and ethnographic interviews follow a more objectivist approach.

In-depth interview

Most flexible and most personal of all types, the focus of in-depth interviews is directed to the intimate sphere of respondents, with a large freedom of the interviewer, who can, however, have some pre-defined topics and questions to ask. It is the interviewee who defines the thread, the interviewer follows his/her train of thought and sometimes leads the conversation back to its main focus. Behaviours, gestures, moves and even posture can also be object of analysis since they also transmit messages.

Narrative interview

The narrative interview aims at accessing experiences and events from the life course of individuals. An example would be a biographical interview with a politician, which can be either thematically focused on those experiences that led him/her to choose this profession, or on a specific stage of the life course, like the most successful period of the politician's career.

Ethnographic interviews

Particularly useful, for instance, in the study of immigrant populations and subcultures, ethnographic interviews tackle the description of a culture or of a migration experience based on the narration of the culture's representatives/social subjects.

As far as the degree of control by the researcher is concerned, interviews can be classified as unstructured, semi-structured and structured interviews.

Unstructured interviews

These interviews resemble everyday discussions, with the interviewer simply presenting/putting to the interviewee(s) the main topic of the data collecting exercise. The researcher/interviewer will have to adapt his/her interventions to the course of the interview as created by the respondent's answers.

Semi-structured

This format of interviews has a set of pre-defined topics that take the form of an interview script (see below point 3). Within each topic the technique resembles the one of the unstructured interviews (see above).

Structured interviews

This type of data collecting takes a format almost like a questionnaire with open-ended items, addressing the same questions in the same order to all respondents.

Focus group interviews are an extension of the classical interview, emerging as one of the most popular qualitative research methods. They involve a small number of respondents (up to 12 people) with whom the interview/research topics are discussed. This method needs further observers on site to help studying the group dynamics and communication chains.

Interviews are preferred as highly valid and flexible research tools, as respondents are requested to formulate their own thoughts, however, because they are not based on probabilistic principles, the degree of inference to other groups of their results is limited. Additionally, the high value of the interview-as-conversation for data collection, is that subjects being interviewed will relate well to the exercise: everybody is familiar with talking to other people, while not everybody is familiar with having to fill in a questionnaire.

Carrying out an interview – Core content

The semi-structured interview – Guidelines

Main point to be held: A semi-structured interview should be experienced as a conversation by both participants (researcher/interviewer and informant/interviewee). This is not always something easy to achieve because the semi-structured interview is in fact a technically informed way of collecting information (Blackstone 2012). Nevertheless, if you keep in mind the main point to be held referred to above, it should be easier for you, the interviewer, to carry out a semi-structured interview in a successful manner.

And what makes a semi-structured interview a successful one? Two things: 1. that you are able to access the information you seek; and 2. the register of the information conveyed will allow for proper treatment of the data collected. In order to achieve these two goals, some matters need to be taken into consideration at the preparation stage and the carrying out stage.

Preparation stage

Writing of the semi-structured interview script

Although a semi-structured interview does not have a list of questions as such to ask the interviewee/informant, you must produce what is called an interview script (Blackstone 2012).

The script is a set of topics that you aim to address during the process of data collecting, i.e. during the semi-structured interview *cum* conversation that you as researcher will

hold with the person you choose, i.e. with your informant. The script will act as guidance to the inquiry process, i.e. to the development of the conversation with your informant. As such, the script should have the list of topics you want to address (for instance: level of formal schooling; feelings of insecurity in public space; perception of main dangers in the Covid-19 pandemic, etc.).

The list of topics in the script will be closely related to the overall research aims, to the questions identified as central to them, and to the variables seen as relevant to the aforementioned questions and research aims. Thus, a good semi-structured interview script is not something that can be produced without thought and careful consideration of the research matters at hand.

Being the collection of the data carried out via a semi-structured interview, the level of control of the conversation framework by the researcher should not impose itself over the frame of reference (whatever that one might prove to be) of the interviewee/informant. And what does this mean, exactly? It means that, whatever topics you are addressing in the conversation (and that are listed in your script), they should be allowed to be voiced by the interviewee/informant within the set of values/interpretations/meanings s/he/they deem as relevant. This relevance will be mostly and foremost expressed by associations made by the interviewee/informant between topics.

The main consequence of this foregrounding of the researcher/interviewee's frame of reference to the carrying out of the interview is that the order of the topics in the script will most likely not be mirrored by the order they will happen throughout the conversation/interview (see below).

Choosing the interviewee(s)

The choice of the person to interview is directly related to the information that the researcher is hoping to retrieve.

Semi-structured interviews should take place at a stage of the research where the researcher already has some reasonable knowledge of the terrain and its contents via field work carried out. This should be so for two reasons:

1. the researcher is able to write a good/useful interview script (see above on topics of interview script)
2. there is some sort of relationship between researcher and informant (i.e. between interviewer and interviewee)

The fact that some level of interpersonal knowledge might already exist previously to the actual interview/conversation is advantageous in terms of guaranteeing the fluidity of information throughout the interview. And again, because a semi-structured interview, if carried out well, will feel like a conversation, the guaranteeing of fluidity of information

between the two people taking part in what is really a situation of social interaction is extremely beneficial to the goals of carrying out a successful semi-structured interview.[1]

There is another very relevant consideration in working on the relationship with potential interviewees/informants before the stage of the research in which the collection of data via semi-structured interviews is scheduled to take place: the need to record the conversation held – and often people might feel uncomfortable with a recording taking place. If a researcher has developed a trusting relationship with interviewees, then the authorisation to record should be less difficult to obtain. The recording of the interview is fundamental for two reasons:

1. the researcher/interviewer can fully emerge him/herself/themselves in the conversation as such
2. a full transcription of the semi-structured interview can be produced so as to allow data treatment

The choice of the interviewee(s) should also contemplate the research aims, the questions identified as central to them, and the variables seen as relevant to the aforementioned questions and research aims. As such, the researcher might need to contemplate selecting interviewees according to gender ratios, age sets, levels of formal education, experience with Y or with Z, etc.

Choosing the place to carry out the interview

The choice of the place where the interview will be carried out should be left to the interviewee/informant, and as to why it should be so is next explained.

As stated above, carrying out a semi-structured interview is a social interaction situation (Ryan et al. 2009). As with any situation of social interaction, issues of power are at play. When it comes to the differential of power between interviewer and interviewee, it is widely agreed that the one who asks the questions (the researcher/interviewer) holds more power than the one who answers them (informant/interviewee). To add to this, there is the additional status/power held by the researcher as someone who holds specialised knowledge and is studying the social universe of the informant. This is more acutely so when the social scientist is 'studying down', i.e. is studying social universes of less empowered individuals (for instance, sharecroppers, illegal immigrants, homeless, etc.); if, instead, the social scientist is 'studying up', i.e. is studying the social universe of more empowered individuals (for instance, members of the upper classes, members of political elites, CEOs, etc.) the power differential might be less – or even actually overturned!

The researcher should act so as to diminish the power differential in an interview situation (something easier to achieve in a 'study down' context than in a 'study up' context). Leaving the choice of the place where the semi-structured interview will take

[1] It should be noted that the interview (even if carried out as a conversation), from the researcher's side is always a methodological stage in which information is being technically collected.

place to the interviewee/informant works precisely toward such a goal since the interviewee will indicate a place that is familiar to him/her/they: the interviewee/informant will feel on home ground, while the interviewer/researcher will have to adjust to what most likely will be less familiar grounds.

Also, and considering the need by the researcher to create the conditions for a fluid exchange of information, i.e. the need to carry out the data collection via semi-structured interview as a conversation (see above), the act of leaving the choice of the place where the interview will take place to the interviewee/informant will also work toward fostering such fluidity of information: the interviewee/informant, by being on familiar grounds, will feel safer and thus more willing to open herself/himself/themselves to the curiosity of the researcher/interviewer.

Only two things overrun all of the above:

1. guaranteeing a good quality recording of the conversation held
2. guaranteeing the safety of the researcher/interviewee; thus, the researcher should not agree to a noisy place or to a place which, she/he might feel, will endanger her/his personal safety (or that of the informant) – an alternative and suitable location should be jointly found

Conducting the interview

Once you have a good script, the right informant (and you have secured his/her/their consent to record the conversation) and a suitable location, you can start the interview.

Opening and closing the interview

Because the researcher will not hold a tight grip on the order of the script's topics throughout the actual interview/conversation in a semi-structured interview, there are, however, two things the researcher/interviewer can and should control. Those two things are the way the interview starts and the way the interview ends.

The topics to be approached initially should be topics that are easy-going, i.e. topics that are not contentious or sensitive (Ryan et al. 2009). The aim is not to alienate the interviewee from the interview, i.e. not to create a feeling of distrust or insecurity in the interviewee/informant. The way an interview should progress is toward approaching more sensitive matters (which vary widely from social context to social context) only once you are deeper into the actual conversation, i.e. once interviewer/interviewee bonds have had a chance to develop (see below).

Once the interviewer/researcher considers that the information required has been collected, the end of the conversation/interview can take place. It is here that the researcher gains again stronger control over the course of the conversation. As quite often a reasonably long time has been spent in conversation in which the informant has supplied information on views, opinions, feelings and event from his/her/their life, and because

quite often this might have a cathartic effect on the interviewee/informant, it is a moral and ethical obligation of the researcher/interviewer to move the topics of conversation toward topic matters that are 'light', even mundane, topics that are able to remove the informant from any sombre place.

At the beginning of the interview, the explanation as to the goals of the conversation should be given in a format that is relatable to the interviewee. The consent for the recording of the conversation should also be secured at the beginning.

Both at the beginning and at the end of the conversation/interview, it should be asked from the interviewee if there is anything s/he/they would like to ask or anything that s/he/they would like to talk about and that was not yet discussed in the conversation held.

Both at the beginning or at the end of the conversation, the researcher must thank the informant for the willingness to share with the researcher and the research project their view on the matters to be addressed or already addressed.

At the end of the interview/conversation an openness to a future and additional contact should also be secured in case, once going through the analysis of the interview, any additional clarification on any specific point is needed.

During the interview

As already stated, a semi-structured interview should feel like a conversation, and an amicable one to that. One of the main things the interviewer must convey to the interviewee is calm and a sense of trust. This is achieved through words, but also through body language and by conversation prompts in which the interviewer is able to let the interviewee understand that what is being said is being understood and is important (Walters 2002).

Working toward the goal of carrying out the interview as a conversation is the issue of the correct use of language (vocabulary/expressions). The researcher should strive to make use of a language that brings him/her/they close to the informant. This will be made more possible if the language used is the closest possible to the language used by the informant. Technical or over-academic terms should be avoided (no one holds a conversation using such terms) and the use of the language by the researcher should be one that leaves the meaning of the questions clear to the informant.

The formulation of value-laden questions should be avoided.[2] The formulation of questions that are already suggesting a specific answer must equally be avoided.[3]

[2] Example: *Your decision to go to hospital to give birth was because it is the right place to have children?* vs. *What guided your decision to go to hospital to have your children?* (value-laden question – in as much as in the first formulation you are stating that the hospital is the right place to have children – what, considering the power differential in the interview situation – makes it very difficult for any other reason to surface; in the second formulation of the question you are leaving the direction of the answer completely open and thus unbiased.

[3] Example: *What kind of problems do you have with your boss?* vs. *How is your relationship with your boss?* (question suggesting a specific answer – a description of problems with the boss – in as much as in the first formulation you are assuming that the informant has problems with the boss; in the second formulation of the question you are leaving the direction of the answer completely open and thus unbiased).

The ability of the researcher to be aware when s/he is formulating such a type of questions is something that does require some self-reflexivity and some degree of training – but it is a fundamental skill to develop as an interviewer.

The most difficult thing for the researcher to achieve in the process of carrying out a semi-structured interview is the balance between giving the necessary freedom to the interviewee as far as responding to the questions posed and the keeping to the topics of the script. It will happen that practice will add to better performance, but perhaps the first times you are interviewing or are using a new script there will be occasions when you feel the need to go back to the written script in order to make sure you have not missed anything, or even just to figure out where to go from where you might be in the conversation at one certain point. It is fine to do so, but the more practice you have with one script the easier it will get.

Technical matters

The following are some points to keep in mind when carrying out a semi-structured interview as described above.

Before the actual interview, make sure you verify the working state of your recording device. Additionally, make sure you go to the interview with the necessary batteries, so you do not run short of power during the recording.

Once you are at the location where the interview is going to take place, and once you have secured the authorisation to record the conversation, do a trial recording (a couple of minutes will be enough) to check that the quality of the recording will allow you to fully understand what is being said.

Never go with limited time for an interview. Although some informants are less, and others are more talkative – having to say to someone who has made him/herself available to talk to you about matters pertaining to their lives, that you have to stop the conversation and go is something that will most likely jeopardise the researcher–informant relationship. Always go with total availability of time so you can listen and relate to the interviewee's life and perspectives.

Although more costly timewise, a full transcription is always preferable: it might cost you a reasonable amount of time to do so (or cost you funds in order to pay someone to do it), it is worth it: once you have the full transcript you are left with a solid working document you can recur to time and time again. Just make sure that you register in the transcript where in the timeline of the recording that part of the interview/conversation is (for instance, every ten minutes of recording, list the recording timeline point/number in the transcription; this notation works similarly to page numbers in a book:

Due to the power differential talked about in the main text, the informant, although possibly not considering that has problems with the boss, will try and find something that will fit what is obviously the expectation of the researcher: that the relationship with the boss has problems.

it will allow you to swiftly go back in the recording to specific moments of the interview when needed).

Analysing the data

Qualitative data analysis can be defined as the process that aims at making sense of human experience by reducing, data identifying patterns, and making sense of large amounts of information, often from diverse sources. In this process, the researcher aims at achieving a research objective by answering one (or more) research questions, usually, but not necessarily, following an inductive logic-based process, in which, from descriptive information, a profound explanation or interpretation is developed. Data may consist of interview transcripts, observation logs, field notes, documents, multimedia content, among others. Qualitative data analysis, while it may include image and video, pays attention primarily to the spoken and written word, considering its context, consistency and contradictions.

We distinguish six major types of qualitative data analysis among which we choose based on our initial purpose. The most commonly used methods are: thematic analysis, content analysis, grounded theory, discourse analysis, narrative analysis, and, lastly, phenomenology or heuristic analysis (Richards–Morse 2012). During this course we will cover the first two methods, namely the thematic and the content analysis.

Content analysis

Definition, purpose and types

According to Krippendorff (2004) content analysis is the systematic reading of a body of texts, images and symbolic matter, not necessarily from an author's or user's perspective.

Content analysis is often used to analyse texts, documents, audio or video recordings, to which we refer as content. The main goal of the method is to look for frequencies of words, patterns or sequences of occurrence of specific words in the content (text, movie, etc.). Although the method of content analysis does not usually rely on data provided by participants such as surveys, interviews or observations, it can also be used for these.

The literature distinguishes between two types of content analysis, namely the quantitative and the qualitative content analysis. The quantitative analysis is more concerned with the manifest meaning of the analysed data, while the qualitative analysis is mostly applied to context dependent meaning (Schreier 2013). In other words, quantitative content analysis is used to discover facts from counting the occurrences of words, expressions, phrases or situations represented in a content, and often counting their percentage to the total found in the original content. These are called categories and represent the major point of interest of the researcher. The categories were chosen/created

by the researcher and are closely related to the overall research aims, to the questions identified as central to them, and to the variables seen as relevant to the aforementioned questions and research aims.

For example, we might use an EU document as our content, while the categories might be concepts such as "terrorism", "power" or "security threats". Since these are broad concepts, during the analysis they need to be broken down into more specific categories, named "codes". For example, the category "power" will be broken down into codes referring to "hard power" and "soft power". During the analysis the codes will be counted and the results will be represented in various tables, graphs, charts showing the relationships between these codes and categories.

Qualitative content analysis is different mainly in its focus on discovering and describing meaning in context. In a qualitative content analysis categories and codes are looked for and counted in the content even if the terms might be present only implicitly. Qualitative content analysis does not stop at showing occurrences and frequencies of the categories: it tries to explore the existing relationships between the categories (for instance, opposition, strengthening, complementarity, etc.). It is appropriate to be used in cases when a researcher's purpose is to find categories in a large data collection, and to draw conclusions based on the frequency and relationship of codes. For example, a researcher might want to learn about the support or opposition regarding a particular topic in a content. In this case, the category "opinion" might be created, having the subcategories "morally justified", "morally wrong", "not taking decision", etc. The overarching theme will be elaborated based on the frequency of codes.

Differences between content and thematic analysis

The terms content analysis and thematic analysis have been associated with many definitions and are often used interchangeably with a vast number of other terms such as content, category, domain, unit of analysis, phase, codes and sub-codes. There is a considerable diversity of research where thematic analysis is considered a special subtype of qualitative content analysis.

Since content analysis has been embraced to a certain degree by the quantitative researchers as well, quantitative content analysis is more often used. In the following, when referring to content analysis, we will refer to the quantitative content analysis as it has been more frequently used.

Content analysis and thematic analysis have different main purposes. Content analysis uses the deductive approach, since it starts with a general statement or hypothesis, and examines the possibility of its applicability in a logical way in a particular case. In this sense, this approach is more objective and systematic because the various categories and codes are created beforehand based on theoretical considerations. The researcher counts the frequencies of the codes and draws conclusions based on the relationship among the codes and categories.

Thematic analysis, as it will be discussed below, uses more often the inductive approach, although not exclusively. By carefully examining a specific situation, the researcher is concerned in finding major themes across texts, by showing the overarching relationships among these themes, and aims to draw conclusions on an abstract, general level.

In this case, the frequency of the themes does not play a central role when creating a thematic map, as opposed to content analysis. It is rather organised so as to represent some level of response pattern or meaning within the data set (Braun–Clarke 2006) and it captures something important in relation to the overall research question (Spencer et al. 2003; Braun–Clarke 2006).

As a conclusion, the two types of analysis are appropriate for answering different types of research questions, and thus, applicable to different research designs. Quantitative content analysis is used to test hypothesis, is more objective, but might miss on important aspects present in the data. Thematic analysis is appropriate to explore new meanings and nuances; therefore, it is mostly used in building hypothesis.

Thematic analysis

Definitions, main characteristics and paradigms

Thematic analysis is a widely used qualitative data analysis method aimed at identifying, analysing and reporting patterns (themes) in the data, enhancing the understanding of explicit and implicit meanings associated with textual data (Braun–Clarke 2012). According to the same authors, thematic analysis encompasses a set of core concepts, namely:

- theme
- sub-theme
- code
- central organiser
- thematic map

For a practical understanding of the development of the thematic analysis, we recommend reading the work published by Young et al. (2018), regarding humanitarian workers' views on their stressors and coping strategies. In this research, participants were asked to answer the following open-ended questions: *What are your top 3 stressors in your role as an aid worker? What are your top 3 most effective strategies you use to cope with stress related to being an aid worker? What are your top 3 least effective coping strategies?* Thematic analysis of responses to the three open-ended questions revealed 4 broad themes and 19 sub-themes, representing 106 codes used 1,805 times (Young et al. 2018). Let us next look at the conceptual description of each element.

A *theme* allows capturing common patterns throughout the data, considered important in the context of a research question. A *sub-theme,* although not being compulsory, captures a specific element of a theme, corresponding to a subdivision. *Codes*

correspond to smaller units of analysis, which identify a particular feature of a data segment. They translate a summarised idea of the units of record of the analysis, which are coded text segments. The *central organiser* of the analysis is a main idea around which the data is grouped and relationships between themes are established. It is an idea that allows answering the research question (or questions) and the relationship of all themes in the analysis. It captures the meaning of the themes and gives them coherence. The *thematic map* is a graphic representation that displays the overall conceptualisation of data patterns and the relationships between them.

One of the main characteristics of thematic analysis is flexibility, as this method of data analysis can be used regardless of the theoretical framework adopted, research questions, data collection methods and number of participants. Thematic analysis allows a rich description of an entire data set or a detailed description of a particular aspect of the data. It can be a more inductive or deductive analysis, although Braun and Clarke (2012) consider the possibility of conducting mixed analyses, i.e. combining inductive and deductive forms. The themes may be semantic or latent and the paradigms guiding the analysis may be essentialist or constructionist.

Phases

In addition to a set of concepts and paradigms that should be clarified when starting a thematic analysis process, Braun and Clarke (2012) have defined a set of phases (or stages) to follow in order to guide the whole analytical process. These stages allow guiding the researcher in a reflexive and engaged process with the data, particularly if the analysis is guided through a constructionist lens. The authors propose a set of six phases (or stages) to be fulfilled within the scope of thematic analysis, namely:

- familiarising yourself with the data
- generating initial codes
- searching for themes
- reviewing potential themes
- defining and naming of themes
- producing the report

Each of these phases is discussed below.

Familiarising yourself with the data: at this stage, the aim is to get to know the collected data in detail, sometimes in audio format. In this case, it is necessary to transcribe the interviews. This is a very important phase as it is the phase which provides the basis for the rest of the analysis.

Generating initial codes: at this stage, the most interesting characteristics of the data collected are coded systematically throughout the entire data set, collecting relevant data for each code.

Searching for themes: this stage aims to combine the codes into potential themes and consider the relationship between codes, themes and sub-themes. At this stage,

graphical representations may be useful. It should be noted that themes are not necessarily determined by the number of times they appear.

Reviewing potential themes: at this stage, it is essential to check whether the themes agree with the coded excerpts and the whole data set. It is in this phase that the themes are refined, and the thematic map of analysis is produced, selecting the excerpts that are intended to be made visible. This phase ends when it is considered that the refinement no longer adds anything substantial to the analysis.

Defining and naming of themes: in this phase, the specificities of each theme and the general story that the analysis tells are refined, i.e. the central organiser. To this end, per theme, the excerpts are returning to, the most illustrative ones are chosen and organised into a coherent and consistent explanation, accompanied by the researcher's narrative. It is at this stage that the story each theme tells is identified and how it relates to the wider story that the data show through the central organiser. It is at this stage that the researcher names each theme. Each theme should have a clear focus, scope and objectives and together the themes should provide a rich, coherent and meaningful picture of the prevailing patterns in the data that answer the research question (or questions).

Producing the report: at this stage, examples are selected from the most illustrative and easily identifiable extracts of the subject under discussion. It is important to reinforce that the examples are only meant to illustrate and are not intended to justify any discussion that is being developed. This last phase is also the final analysis of the selected excerpts. We return to the analysis, the research question (or questions) and the literature and write the report. This report writing brings a narrative that, in addition to describing the data, problematises it, bringing arguments in relation to the research question (or questions) and the research objectives, which are answered from the central unfinished sentence.

Conclusions

In qualitative research, the numbers and types of approaches have become more clearly visible during the 1990s and into the 21st century (Cresswell 2014). However, in qualitative research the delineation of the sequence of stages can be seen as more controversial than in quantitative research because it exhibits somewhat less codification of the research process (Bryman 2016). It is hoped that this text, while focusing specifically on the use of the semi-structured interview as a data collecting tool, as well as focusing on a form of treating the data thus collected, will help the reader in the procedures related to carrying out research using these particular tools.

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