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Fundamentals of Qualitative Research in Music Education: An Introduction

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Abstract

Qualitative research continues to grow in popularity in the music education community. Data collection and analysis methods associated with qualitative inquiry allow researchers to investigate the complex realities created by individuals as they experience music and music education. The purpose of this article is to offer a brief overview of fundamental concepts and terminology associated with qualitative research in music education, including philosophical underpinnings, common methodologies, data collection and analysis methods, and important considerations for ensuring rigor and accuracy of findings. This methodological article may serve as a first introduction to qualitative inquiry for novice researchers and practicing educators seeking a primer, or as a refresher for more seasoned scholars seeking high-quality current examples in the literature. To those ends, I have included references to frequently cited methodological sources and examples of qualitative research methods in prominent music education journals to guide readers in further learning.

Keywords: methodologies, music education, paradigms, qualitative data collection and analysis

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Introduction

Over the last several decades, qualitative research has grown in popularity among music education researchers (Conway, 2014). This fact has been expressed both anecdotally (Walter, 2019) and via content analyses of some of the prominent music education journals in the United States, which have revealed an increasing rate of submissions and publications of qualitative studies over time (Killian et al., 2012; Lane, 2011; Sims et al., 2016; Yarbrough, 2002). For example, in a review of *Update: Applications of Research in Music Education*, Silvey et al. (2019) found an increase in the percentage of published articles that were qualitative studies, from 2.67% (1989-1998) to 7.48% (1999-2008), and then to 15.09% (2009-2017). They surmised that authors and editorial committee members have become more accepting of qualitative methodologies and expressed that qualitative research's reliance on "descriptive narrative and storytelling as compared with the statistical analysis employed in quantitative methodologies" (p. 60) makes it more accessible to those untrained in research methodologies. It is important to note, however, that as qualitative research emerged out of quantitative traditions in the early 20th century and matured over the last hundred years (see West, 2018, for more detail), it has developed its own set of ever-evolving philosophies, methodologies, methods, and accompanying terminology.

The purpose of this article is to offer a brief overview of important concepts and terminology associated with qualitative research in music education. It is hoped that this may be useful as a resource for educators who wish to evaluate qualitative research findings and apply them to their practice, as well as for novice researchers at the beginning of their qualitative research journeys. More seasoned qualitative researchers may also benefit from this overview and the examples of recent applications in music education literature. Each concept covered here

has received extensive attention from scholars in dedicated articles, handbooks, and guides. This article merely scratches the surface of each and offers references for further investigation in the form of frequently cited methodological sources and exemplar studies from prominent music education journals. First is a brief explanation of philosophical underpinnings, followed by descriptions of methodologies, data sources, analytical techniques, and quality assurance methods.

Philosophical Foundations

Qualitative research is grounded in philosophy. A researcher undertaking qualitative inquiry inherently takes on a set of philosophical assumptions that guide decisions related to their study. Creswell and Poth (2018) identified four such assumptions: *ontology*, *epistemology*, *axiology*, and *methodology*. Ontology relates to the nature of reality. Some scholars believe in a single, universal reality that exists independently of human experiences. Contrarily, many qualitative researchers believe in multiple realities, created by individuals as they interpret the world around them (*interpretivism*) and construct meaning out of their everyday lives (*constructivism*/*constructionism*). Although the labels interpretivism and constructivism are often used interchangeably to describe qualitative research, they do not fully encapsulate all the ontological stances taken by qualitative researchers. Epistemology relates to the nature of knowledge (i.e., how it is possible to know something, and the relationship between knower and knowledge). In quantitative inquiry, objective evidence from strict adherence to systematic experimentation is used to back up claims of new knowledge and reveal universal truths about the world. Because qualitative researchers are interested in unique individual experiences, they expect to use subjective evidence collected from participants to generate knowledge rather than reveal it.

Axiology relates to the values and biases researchers bring to inquiry and their implications on research. Quantitative researchers generally attempt to maintain distance from the phenomenon under study to reduce their influence on new knowledge. Qualitative researchers, on the other hand, acknowledge that bias is inevitable, and sometimes even valuable to the process. Finally, methodology relates to researchers' beliefs about research processes and designs. In quantitative research, deductive reasoning is common, in which researchers begin with a theory in mind, make hypotheses about how the world works, and test those claims, moving from abstract theory "down" to the evidence collected in the study. Qualitative researchers are more inclined to use inductive reasoning, which begins by closely examining the data and working "up" to theory by making inferences. Creswell and Poth's use of the term *methodology* in relation to philosophical assumptions should not be confused with its other common use of describing specific sets of research methods (what Creswell and Poth termed *approaches*), which are discussed in more detail later.

Paradigms

Beliefs about ontology, epistemology, axiology, and methodology are lumped together in different combinations to create research *paradigms*, what Herbert Kohl (1992) described as "orientation[s] of mind that determines how one thinks about the world" (p. 117). Scholars take different approaches to defining and classifying qualitative research paradigms. Terminology is often confusing as terms are mixed, matched, overlapped, and applied in different ways that mean the same thing (Butler-Kisber, 2018). For example, paradigms have also been called *interpretive frameworks* (Creswell & Poth, 2018) or *worldviews* (Butler-Kisber, 2018). Several varying lists of paradigms exist in the literature, but most prominently cited are those of Creswell

and Poth (2018), Guba and Lincoln (1994), and Patton (2015), which describe paradigms such as postpositivism, social constructivism, transformation/critical theory, postmodernism, and more.

The role of paradigms in research is not universally agreed upon among scholars. Some (e.g., Allsup, 2014) contend that these philosophical beliefs affect every decision related to a study, whether the researcher is conscious of it or not. According to Scheib (2014):

> The researcher's worldview shapes the entire investigation—the design of the study, research questions, data generation, and findings. Identifying and disclosing this worldview is therefore critical to sufficiently presenting, understanding, and contextualizing the research for both the investigator and the consumer. (p. 78)

Other scholars, however, argue that philosophy should be subordinate to practicality, and that research methods should be "a function of the nature of the topic, the milieu or context within which the focus of inquiry lives, and the types of complementary and interrelated understandings desired" (Myers, 2018, p. 100). One embodiment of this idea is *pragmatism*, a kind of anti-paradigmatic paradigm which supports setting aside ontological and epistemological considerations to focus on methods best suited for the context (Kaushik & Walsh, 2019; Morgan, 2014).

According to Butler-Kisber (2018), researchers are allowed flexibility in how they embody a paradigm, but "it is the way researcher perspectives are explained and made transparent that is most important" (p. 15). Unfortunately, many researchers fail to disclose their paradigm(s), leaving readers to read between the lines and guess the principles guiding the study. You might find paradigmatic stances mentioned in article introductions, but you will more likely find their descriptions and influences in methods sections. For examples of well-stated

paradigmatic stances in music education research, see Sweet (2018; constructionist), Fitzpatrick et al. (2014; critical theory), and Parker and Draves (2017; transformative).

Methodologies

Research *methodologies* connect the abstract philosophical issues that concern paradigms with the methods (i.e., processes and tools for performing data collection and analysis) that are used to carry out research. You might also see them labeled as *approaches* (Creswell & Poth, 2018), *designs* (Merriam & Tisdell, 2016), *genres* (Marshall & Rossman, 2016), or *theoretical traditions* (Patton, 2015). Common methodologies in music education research include *phenomenology*, *ethnography*, *case study*, *grounded theory*, *narrative*, and *basic*.

Phenomenology

Researchers who undertake phenomenological research are interested in capturing the *essence* of a phenomenon, or the "basic underlying structure of an experience" (Merriam & Tisdell, 2016, p. 27). In other words, they are interested in creating new knowledge about a phenomenon (e.g., surprise, anger, love) not just by describing the phenomenon alone, but by investigating *how* humans experience it. Researchers conduct several lengthy, in-depth interviews with many individuals about their experiences, and then use analytical techniques specific to phenomenology to develop a description of those individuals' shared experiences. Scholars often cite Moustakas (1994) when describing their phenomenological methods. For an overview of 18 phenomenological studies across five prominent music education journals, see Joubert and Van der Merwe (2020). Specific examples worth investigating include the work of Bovin (2019) and Robison (2017), who described the essences of being a female high school band director and a male elementary general music teacher, respectively. Also, Shevock (2018) interviewed a bluegrass fiddler, a jazz bassist, and a baroque violinist to explore what it is like to

experience confidence in improvisation, while Sweet and Parker (2018) examined how females experience the development of their vocal identities.

Ethnography

The traditions of ethnography stem from anthropology and sociology of the early 20th-century when researchers would travel to remote areas to study indigenous populations. The root "ethnos" means culture, which is the key focus of this type of study (Marshall & Rossman, 2016). A group's culture can include social behaviors and norms, rituals, ideas and beliefs, languages, and more. Ethnographies require that researchers immerse themselves in the culture for extensive periods of time, collecting data in the form of interviews, observations, and extensive field notes. Contemporary ethnographers in music might study groups such as ensembles, schools of music, music organizations, specific sets of music consumers, or even social movements in music. Wolcott (2008) and Van Maanen (2011) are two scholars that have substantially influenced contemporary ethnography. Two examples of studies in music education include the work of Howard (2018), who immersed herself in a class of culture-sharing fifth-grade students to learn how they would respond to a multicultural music curriculum, and Silverman (2018), who examined the culture and lived experiences of participants in a university-level West African drum and dance ensemble.

Case Study

A researcher performing a case study focuses on explaining one thing well. It could be something unusual (an *intrinsic case*) or something important to understanding a broader issue (an *instrumental case*; Creswell & Poth, 2018). A case study is characterized by "the unit of analysis, *not* the topic of investigation" (Merriam & Tisdell, 2016, p. 38). Merriam and Tisdell describe this thing as a "bounded system" (p. 37). In other words, the researcher should be able

to draw a boundary around the subject of study, limiting it to a specific time and context. Many studies focus on an individual person, but the bounded system could be a class, ensemble, program, project, curriculum, organization, policy, or relationship. A researcher might be interested in AP music theory instruction (the topic), but it is in choosing to study a single AP music theory teacher (the unit) that the researcher performs a case study (see Buonviri, 2018). For the sake of comparing like things, researchers can also group them together to perform a *multiple-case* or *collective-case* study. For example, Parker (2016) performed a multiple intrinsic case study to explore how four public-school choral teachers create and sustain a sense of community. Other examples of case studies in music education include Haning (2021), who investigated a collaborative learning approach in a choral class, and Shaw (2018), who highlighted an urban school district that cut its elementary arts programs. For more on case studies, see Yin (2018).

Grounded Theory

In many studies, researchers apply theories of how the world works to guide their inquiry. For example, someone interested in motivation might search for themes in their data based on ideas from self-determination theory, expectancy-value theory, or some other theory of human motivation. Grounded theorists, on the other hand, seek to generate a theory based on (or "grounded" in) the data. They often collect data in multiple waves, performing the *constant comparative method* (Birks & Mills, 2015; Glaser & Strauss, 1967), which involves cycling between data collection and analysis, constantly comparing new data against developing categories and themes, and sometimes tailoring subsequent interview questions based on new revelations. There are two well-established approaches to grounded theory. While researchers sometimes borrow analytical techniques from these approaches, a true grounded theory study

will adhere to the rigorous procedures established in each. For an example of Charmaz's (2014) approach, see Weidner (2020), and for an example of Corbin and Strauss's (2015) approach, see Parker (2018).

Narrative

Narrative studies focus on stories. Because stories "are how we make sense of our experiences, how we communicate with others, and through which we understand the world around us" (Merriam & Tisdell, 2016, pp. 33-34), investigating them gives us a method to explore individuals' lived experiences through their own interpretations. There are numerous approaches to performing narrative research, but they primarily fall into two categories. In the first, the narrative is the subject. For example, a researcher might analyze the story an individual tells of how they joined orchestra, or the stories told by a group of minority students navigating the music conservatory. In the second category, the narrative is an analytical method in which the researcher *restories* data in a framework that consists of a beginning, middle, and end, with characters, a plot, and a context (Creswell & Poth, 2018). Examples of narrative studies include the works of Minette (2021), who explored the stories of two lesbians navigating the complex interaction between their sexuality and careers as music educators, and Parker and Draves (2017), who re-storied the experiences of two music education majors with visual impairments. While phenomenology and grounded theory have traditional and prescribed methods, narrative studies can be quite flexible. For more on narrative research, see Clandinin (2013) and Riessman (2008).

Basic

The previous five methodologies focus on specific dimensions of human experiences: phenomena, cultures, cases, theories, and stories. However, a qualitative study is not required to

adhere to one of those methodologies. In fact, the most common methodology in qualitative research is the *basic* interpretive study, in which "the overall purpose is to *understand* how people make sense of their lives and their experiences" (Merriam & Tisdell, 2016, p. 24). In a basic study, researchers simply adopt qualitative paradigms and methods to investigate lived experiences in seeking answers to their research questions. Basic studies are particularly recommended for novice researchers (Conway, 2014). Escalante (2020) and Pellegrino (2015) both described their investigations as basic qualitative studies.

Methods: Collecting Data

Decisions regarding the type of data collected in qualitative studies are guided by the researcher's paradigm, methodology, research questions, and participants. At the simplest level, one can categorize data that are expressed in numbers as quantitative and data that are expressed in words as qualitative. There are three common sources of qualitative data: interviews, observations, and documents/artifacts. In music education, we also have the potential to use music-making as qualitative data.

Interviews

The interview is the most common data collection tool used in qualitative research. Researchers may choose to interview multiple individuals at a time, which is known as a *focus group*. However, most interviews are performed one-on-one. Interviews are valuable because they reveal information that cannot be gathered via observations; they provide access to participants' perspectives by allowing them to share their lived experiences (Patton, 2015). Prior to beginning the interview process, the researcher carefully creates what is called the interview *protocol*, or *guide*, which consists of prompts, initial questions, and possible follow-up questions. The protocol can take one of three forms: structured, semi-structured, or unstructured (Roulston,

2010). Structured interviews are exactly as they sound; questions and their order are predetermined, and the researcher strives to interview each participant in the exact same way. In semi-structured interviews, the protocol leaves some flexibility for follow-up questions or adapting questions on the fly. However, all participants are mostly asked the same set of questions. In unstructured interviews, questions are more open-ended and conversational, allowing the dialogue to wander as the researcher and participant explore the phenomenon together. Unstructured interviews are typically used when little is known about the research subject, to inspire the creation of questions for future interviews and/or studies. For an example of a semi-structured interview protocol, see Mio (2019).

Interview protocols can be influenced by relevant methodologies and theories. For example, questions in phenomenological interviews are constructed to elicit participants' experiences around a phenomenon, ethnographic interview questions are designed to gather participants' knowledge about their culture, and questions in a narrative study are meant to encourage storytelling. If a theory guides the inquiry, the researcher will likely create questions based on themes found in the literature of that theory. For an example of how a researcher created an interview protocol based on research questions, see Gavin (2016). Interviews are typically recorded, given permission of the participant, and transcribed verbatim (i.e., word for word). Once recordings are transcribed, they are destroyed to protect participants' anonymity, making the transcripts the remaining source of data.

Observations

Used particularly in ethnographies, but useful in all forms of qualitative research, observations involve capturing and describing individuals or communities in their ordinary settings. The structure of observations will vary depending on the research questions and

participants. An observation can be unstructured and focused on discovery, allowing the researcher to enter the setting with an open mind toward noticing patterns in behaviors and interactions, or it can be structured and focused on specific themes. When researchers perform observations, they must decide the level of which they will engage with the subject. Creswell and Poth (2018) described four types of participants: (a) complete participant (entails full immersion in the activity); (b) participant as observer (involves participation in the activity but allows moments to step aside and record data); (c) nonparticipant or observer as participant (requires maintaining distance and taking notes from the periphery); and (d) complete observer (the presence of the researcher is not noticed).

Field notes are critical to ensuring that data generated from observations are accurate. Just as with interviews, it is recommended that observers use a protocol to guide their note taking. The chosen level of involvement partially determines the type of note taking that the participant will use. Observers that are more actively involved may need to make brief notes known as *jottings* (Emerson et al., 2011; Saldaña & Omasta, 2018), and return to them later to more fully flesh-out the sights, sounds, and smells of the environment. No detail is too small to include in field notes. These details are later used by researchers to create *thick descriptions* (Geertz, 1973; Jorgensen, 2009) in the presentation of their findings, which are critical to immersing the reader in the environment and backing up analytical claims based on the observation. For an excellent example of thick description, see Parker (2016).

Documents and Artifacts

Although the analysis of documents and artifacts can be the sole focus of a study, they are most often used in qualitative research to validate or enhance data gained from interviews and observations (Marshall & Rossman, 2016). Documents come in many forms. They can exist

already, independently of the study (e.g., newspaper articles, websites, posters, emails, mission statements, purchase orders, policy manuals), or they can be generated as part of the data-gathering process (e.g., participant journals, reflections, writing samples). A researcher studying the phenomenon of composing in a high school music theory class might analyze the class syllabus (a pre-existing document), collect drafts of student compositions (writing samples), and ask participants to complete journal entries about positive and negative feelings as they succeed and fail at writing music. For an example of the use of pre-existing documents, see Shaw (2018), and for an example of the use of student reflections as data, see Haning (2021).

Artifacts can include any material objects related to the study. They can be natural or manmade, used in everyday life or customary rituals, or even consist of residual traces of human behavior (e.g., worn grass on the marching band practice field as evidence of the band's many hours of rehearsal). A researcher performing a critical study on underfunded music programs might use dilapidated school-owned instruments as artifacts, while another researcher examining competition culture in high school show choir might highlight the plaques and trophies displayed around the choir room. Researchers who use documents and artifacts as data must be careful, as these items are usually not created with research purposes in mind. Therefore, some interpretive leaps must be taken in the analysis process, and researchers should avoid jumping to conclusions too quickly.

Music-Making as Data

It seems sensible that music education researchers would utilize music-making as data. However, as Pellegrino (2014) noted, "music-making as data has not often been addressed as a separate topic in American music educational research" (p. 321). While quantitative researchers might find it easier to use music-making as data because of the ways in which tempo, rhythm,

intonation, dynamics, etc., can be quantified, qualitative researchers might struggle with music-making as data because of the messy and complicated steps involved with interpreting how music-making exhibits meaning for the participants. Pellegrino categorized three types of music-making data: *process-of-music-making*, *product-of-music-making*, and *meanings-of-music making*. Process-of-music-making data are generated from the occasions in which musicians are developing their craft or preparing for performance, including practice sessions, rehearsals, private lessons and masterclasses, the act of composing, etc. Haning (2021) used process-of-music-making data by incorporating observations from student-directed rehearsals into his analysis. Product-of-music-making data come from the finished product, which could be a recording, performance, or composition. In his study of confidence in improvisation, Shevock (2018) attended performances in which the participants improvised and weaved that data into future interviews and analyses. Meanings-of-music-making data are used to "derive the meanings participants make of the music-making in the moment" (Pellegrino, 2014, p. 314), which fits well within qualitative research's aims of understanding how humans interpret their worlds and construct meaning. In examining a West African drum and dance ensemble, Silverman (2018) incorporated many hours of rehearsal footage into her analysis and discovered how the musicians found spirituality, community, and joy in their music-making. Although incorporating music-making as data into qualitative studies provides unique challenges, it also has the potential to offer great insights.

Other Data Collection Considerations

Sampling is the process by which researchers select the individuals or settings for a study. Sampling methods in qualitative research vary tremendously based on the selected methodology and research questions. For example, in phenomenology, it is crucial that each participant has

experienced the phenomenon under study, while in an intrinsic collective-case study, the researcher might desire a collection of individuals with contrasting backgrounds and experiences (*maximum variation sampling*). In ethnography, it is recommended that researchers immerse themselves in the culture and then rely on intuition to select individuals based on pre-established criteria (*criterion sampling*) or work with the individuals that are available (*opportunistic* or *convenience sampling*; Creswell & Poth, 2018). Most often, qualitative researchers use some form of *purposeful sampling*, which involves selecting participants based on their ability to contribute to the understanding of the research topic. For detailed descriptions of several sampling techniques, see Patton (2015).

Just as quantitative researchers focus on validity and reliability to ensure rigor and accuracy in their studies, qualitative researchers focus on credibility, dependability, confirmability, and transferability (Marshall and Rossman, 2016). Several of these concerns can be addressed during the data collection process. *Triangulation* entails using data from more than one source to corroborate findings, which is why many researchers will interview different types of participants (e.g., teachers, students, and parents) or combine data from multiple sources (e.g., interviews, observations, and documents analysis). *Member checking* involves conferring with participants on the accuracy of interview transcripts and analysis findings to ensure that their interpretations of the world were correctly captured. *Prolonged engagement* in the field and *data saturation* are meant to demonstrate trustworthiness by highlighting how a researcher has done enough to capture the phenomenon in question. Saturation occurs when a researcher has collected enough data that they begin noticing the same patterns repeatedly in analysis and feel that continuing data collection will no longer contribute to new knowledge. The concept of saturation in qualitative research is gradually being replaced with *theoretical sufficiency*, which

"acknowledges the fact that we can never know everything and there is never one complete Truth" (Marshall & Rossman, 2016, p. 229).

Methods: Analyzing Data

Although descriptions of data analysis processes are often condensed to just a few sentences in research articles, they are perhaps the most important part of a study. According to Flick (2014), "Data analysis is the central step in qualitative research. Whatever the data are, it is their analysis that, in a decisive way, forms the outcomes of the research" (p. 3). The analysis process is the act of creating meaning out of data, which inevitably requires interpretation by the researcher. This interpretive process is unavoidably impacted by a researcher's values and biases, which is one reason why examining axiological beliefs is so important. To help readers understand and evaluate personal values and beliefs that might affect interpretation of the data, researchers should share their relationship with the research in a *positionality* or *subjectivity* statement (Bourke, 2014). For examples of positionality in music education research, see Anguiano et al. (2020) and Salvador et al. (2020).

Although qualitative research is emergent in nature (utilizing primarily inductive reasoning without predetermined outcomes), the common phrase "themes emerged from the data" is misleading and does not accurately represent what happens (Radina & Humble, 2019). Analysis requires hundreds, if not thousands, of small decisions that accumulate as a researcher tries to make sense of what are often messy and massive piles of interview transcripts, observation notes, and documents. Themes are not inherently present, but rather, researchers *create* themes as they interpret and make meaning out of the data. In fact, if you gave the same data set to five researchers, you might get five different sets of findings depending on the theoretical lenses and analysis methods used (e.g., see Sword et al., 2018). It is important for

researchers to fully and precisely disclose their analysis methods so that readers can judge the findings for themselves.

Thematic Analysis

The most common approach to translating qualitative data into findings is via *thematic analysis*, which involves condensing large sets of data into a few core statements that capture a phenomenon or answer a research question. Like all qualitative data analysis methods, thematic analysis is ideally part of a data analysis spiral (Creswell & Poth, 2018), in which data collection and analysis happen concurrently throughout the study. In most quantitative studies, analysis happens only after all data have been collected and can be included. If qualitative researchers wait until all data have been collected to begin their analysis, they will likely become overwhelmed with the enormity of it (Merriam & Tisdell, 2016). Instead, it is recommended that researchers sit down with their very first interview transcript or observation notes and begin reflecting on their methods and what they have learned. As the spiral continues, researchers can begin to notice patterns in the data, alter interview and observation protocols if necessary, and reflect on the progress of the study (e.g., have they achieved data saturation/theoretical sufficiency?). Throughout the process, researchers should write *memos*, or reflective writings about what methods are or are not working, evolving thoughts about meanings in the data, and possible connections between the data and related literature (Marshall & Rossman, 2016). These memos serve to create an *audit trail*, or a log of methodological decision-making that can back up findings and the validity of the study.

Thematic analysis begins with coding. As researchers process their data, they search for meaningful segments (as small as a word or as large as a paragraph) that might offer insight toward answering a research question. They then assign each segment a *code*. Saldaña (2015)

defined a code as "a word or short phrase that symbolically assigns a summative, salient, essence-capturing, and/or evocative attribute for a portion of language-based or visual data" (p. 3). Codes come in many varieties. *Inductive codes* are created directly out of the data, summarizing phrases or sentences into a few words, sometimes using the participants' actual spoken words (*in vivo coding*). Other codes might be summaries of emotions, settings, participant characteristics, actions, keywords, or other features that might be relevant to the research questions. Inductive coding is encouraged because it allows the researcher to stay immersed in the data throughout the analysis process. This type of coding originated in grounded theory approaches and is typically referred to as *open coding* or *initial coding* (Saldaña, 2015). *Deductive codes* are based on important concepts in the existing literature on the phenomenon and are created before analysis begins. Deductive codes act to focus an analysis and prevent it from getting unruly; it is not uncommon for novice researchers to end up with over a hundred inductive codes, which can become overwhelming to analyze.

Once the first cycle of coding is complete, researchers reread their data and codes multiple times over, recoding if needed and seeking patterns that will eventually develop into categories/themes. Some researchers perform this step intuitively, while others follow prescribed second cycle coding methods described by Saldaña (2015), including *pattern coding*, *focused coding*, *axial coding*, *theoretical coding*, *elaborative coding*, or *longitudinal coding*. In addition to answering research questions, Merriam and Tisdell (2016) described four other criteria for categories, themes, and findings: "be *exhaustive* (enough categories to encompass all relevant data)…*mutually exclusive* (a relevant unit of data can be placed in only one category)…as *sensitive* to the data as possible…*conceptually congruent* (all categories are at the same level of abstraction)" (p. 213). In research articles, coding and categorizing processes are often presented

as linear, but in actuality they are usually messy, time-consuming, and require tremendous reflection and thought.

Other Analysis Methods

Just as statistical procedures vary in complexity and application in quantitative research, qualitative researchers have developed a plethora of analytical methods to meet their various needs. Entire texts have been written to describe the methods that have developed over the last several decades (e.g., see Flick, 2014; Freeman, 2017; Grbich, 2013; Miles et al., 2019; Radina & Humble, 2019). Although thematic analysis is applicable in most qualitative studies, prescribed methodologies often require the use of specific techniques. For example, phenomenological analysis often includes *bracketing* (a special technique for setting aside researcher bias), *phenomenological reduction* (a particular approach to realizing the essence of a phenomenon), and *horizontalization* (a process of laying out data and equally weighting it in the early stages of analysis; Merriam & Tisdell, 2016). Ethnographic and case study methods revolve around different ways of describing and interpreting characteristics of a culture or case, grounded theory methods depend on the constant comparative method, and narrative methods rely on a variety of techniques that explore the *chronology* of stories (Creswell & Poth, 2018). As it is with paradigms, researchers are afforded a lot of freedom when it comes to how they choose to make meaning out of their data. However, it is critical that they are transparent and thorough in describing their analysis processes to avoid "misunderstandings and misconceptions about the nature of the methodology" (Radina & Humble, 2019, p. xix).

Conclusion

Qualitative inquiry provides researchers with tools to capture and communicate the complexities of lived experiences in music and music education. Rather than utilize experiments

and surveys to create generalizable cause and effect statements about the world and the people in it, qualitative researchers immerse themselves within a specific context in the natural world, using interviews, observations, document analysis, and music-making data to deeply examine some aspect of the human experience. Through qualitative methodologies and methods, researchers can explore social phenomena that are difficult to quantify, or for which prior theories have not been established. For example, Talbot (2018) highlighted the lived experiences of individuals from traditionally marginalized communities in music education by featuring the work of numerous scholars who used narrative, autoethnographic, and case study methodologies. Additionally, phenomenology has been used to explore topics such as teachers' micropolitical literacy, multicultural music education, melodic dictation in music theory class, professional development communities, musical identity, informal music learning, popular music pedagogy, and more (Joubert & Van der Merwe, 2019).

In their analysis of publication decisions for *Journal of Research in Music Education* between 2009 and 2014, Sims et al. (2016) found that qualitative research constituted 29.39% of submissions and 27.20% of acceptances. This stark shift for such a prominent journal (up from 5% of articles categorized as qualitative between 1983 and 2008; Lane, 2011), highlights the relative embracing of qualitative research within the field. According to Matsunobu and Bresler (2014), qualitative research in music education has developed into "a legitimate, central methodology, with its own conferences, research journals, and ventures" (p. 21). As qualitative research becomes more accepted and utilized in the field, it is critical that researchers and practitioners stay abreast of best practices surrounding qualitative inquiry. To that end, the purpose of this article was to explain fundamental aspects of justifying and performing qualitative research, to prepare those less experienced with the field to evaluate studies, transfer

their findings, and undertake qualitative studies of their own. I recommend exploring the methodological texts and exemplar studies cited throughout this article as next steps in developing an understanding of the many intricacies of qualitative inquiry.

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