Qualitative Research: Advancing the Science and Practice of Hospitality

A good way to explore the full dimensions of a problem is to examine it first hand, with field-based, qualitative research—using a collaboration between a practitioner and a researcher.

BY KATE WALSH

The concept of qualitative research is potentially exciting both for the researcher and for the practitioners whose organization will be under study. The idea behind research projects is that they will create new findings for the hospitality community while at the same time provide the host organization with competitive insights about itself. Despite the potential value of such studies, the astute hospitality manager also probably wonders about the hidden costs in letting researchers “inside the door.” We can all conjure images of the crazed researcher running around the hotel scaring employees into participating in some study and prompting managers to worry that researchers will run amok, creating more havoc than good. Such managers might further wonder what happens if they end up having to redirect academics who just “don’t get it,” or worse yet, waste the company’s time and resources. In fact, managers may ask, what is it that researchers are trying to do, anyway?

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In this article I discuss the role of qualitative research, its value to hospitality knowledge, and its potential value to hospitality organizations. I also explore the critical role that hospitality managers can play in aiding the research process in a way that best serves their needs, advances knowledge of the field, and benefits the overall industry.

This article has three sections. In the first section I discuss concepts behind qualitative research, including its chief goal, which is the creation of new knowledge. Then I explore the types of qualitative research that academics may perform in organizations, including validity and accuracy checks they should initiate. In the final section I offer ideas on ways that managers can work with researchers to provide organizations with the richest possible returns from research projects.

1 For a detailed explanation of a qualitative-research technique, see: Robert J. Kwortnik, Jr., “Clarifying ‘Fuzzy’ Hospitality-management Problems with Depth Interviews and Qualitative Analysis,” on pages 117–129 of this Cornell Quarterly.
The What and Why of Qualitative Research

The goal of most researchers is to create new knowledge in their field on a topic that excites them (and if truth be told, simultaneously gain a reputation in the community as the originator of that knowledge). Organizational research is unlike most scientific research in that it is applied, meaning that researchers study people, their problems, and their challenges in the subjects' own particular organizational settings. Research questions are derived by the need to understand what makes organizations and the people who run them effective at what they do. A researcher's goal is to uncover the not-so-obvious, counterintuitive findings that advance our understanding of a phenomenon and also provide managers with useful information that can be immediately applied to solve their problems. Simultaneously, researchers' goal is to challenge the conventional assumptions that frame how managers make decisions and run their organizations.

The Exciting Theory

Those goals are a tall order. To understand a complex phenomenon, researchers often need to make small, incremental steps that provide perspective on a theory but which offer little towards a manager's understanding of a problem. True to the notion that research findings often lag management practices, the challenge inherent in this process reminds me of the time when I had discovered what I thought was an exciting research finding. When I shared the "finding" with my mother, she replied in her kindest voice, "Well, that's obvious. After one year of working at a school, I could have told you that." To get to the point where theories are exciting and useful, though, researchers often have to take the incremental, seemingly obvious steps. Such steps help researchers to understand the phenomena that researchers first identify the constructs or phenomena being studied. They next identify any causal relationships between these constructs. In other words, through applying previous research findings and developing causal logic, researchers build arguments as to why and how one construct affects a second one. The constructs and the relationships between those constructs are brought together into a conceptual landscape or theoretical model. Sound theoretical models offer convincing logic to address a previously ignored question or problem about organizations and the people who work in them. From these models, researchers create variables to reflect their constructs and develop hypotheses that depict the relationships between them.

How does qualitative research fit into all of this? To best answer this question, I first offer the following working definition: Qualitative research refers to an interpretative method of collecting and analyzing data to explore and explain a phenomenon.

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attempting to make sense of or interpret phenomena in terms of the meanings people bring to them. Those who perform qualitative research seek to understand the situationally based "local perspective." Specifically, they seek to learn how "people in particular settings come to understand, account for, take action, and otherwise manage their day-to-day situations," as well as study the interactions these people have with others that cause them to form these perspectives. Thus, qualitative research is aimed at understanding how and why an organization's members view a particular issue and the ways they behave as a result. Its goal is to build an understanding and reconstruction of the constructs other people hold. Given that organizational research is by definition applied field work, a qualitative perspective is crucial to helping researchers truly understand what they study. When using a qualitative approach, the researcher's view or interpretation is substituted with that of respondents.

Qualitative research plays four critical roles in helping researchers create exciting theories that also have immediate, practical implications for managers. First, through understanding how and why respondents view a particular issue through "rich, thick description," qualitative-research findings act as the building blocks of new theories. Using the results of in-depth interviews on motivation, for example, a researcher can analyze the interview transcripts and categorize key themes that emerge from the data on factors that encourage performance. These themes can potentially be used to develop constructs and the logical relationships between them, thus forming the essentials of theoretical models. Before researchers even formulate and test their hypotheses, they can use qualitative research findings to identify the important ways in which hospitality managers view a particular problem, such as why employees leave their organization. If analyzed appropriately, these viewpoints can be used to advance our theoretical understanding of a problem and serve as a point from which a model can be tested on a wider audience.

Qualitative research findings often identify the not-so-obvious perspectives that are foreign to researchers, who unlike managers, are not "in the trenches" and provide the tenets of interesting, provocative theoretical models in a way that previous research findings alone cannot. Thus, qualitative-research findings can act as the seeds of more-interesting research studies from which researchers can identify meaningful, relevant constructs and create compelling causal logic from the original source, namely, organization members. Studies of this type have the potential to be groundbreaking for both academics and practitioners.

The second role that qualitative research plays is to help interpret quantitative research findings. Once researchers identify a problem to be studied and create the constructs in a theoretical model, they develop a set of variables and related hypotheses to examine. To do so, they often collect quantitative data, using surveys, for example, or a restaurant's operational results. Researchers who use a quantitative approach emphasize ways in which they empirically measure their data, often collecting it from a wide variety of sources and testing it using statistical methods to help improve the generalizability of their findings. The challenge with quantitative research is that it often reports empirical findings without being able to explain why they occurred. Many times researchers end their reports with implications, in which they theorize why their results turned out the way they did and offer their ideas as "avenues for future research." Qualitative research, with its interpretive strength, can help solidify such theorizing. When researchers simultaneously use several methods to address the weaknesses inherent in each one (a process called triangulation), they can improve the strength and, usually, the trustworthiness of their findings.


9 E.G. Guba and Y.S. Lincoln, "Competing Paradigms in Qualitative Research," in Denzin and Lincoln, pp. 105-117.

10 Denzin and Lincoln, p. 6.
In an interesting study of service in a major convenience-store chain, for instance, researchers used previous research findings to predict that the more the store’s employees displayed positive emotions toward customers (such as offering a greeting, saying thank you, smiling, and making eye contact), the greater the store’s sales. In actuality, the researchers found that the opposite relationship existed—that is, the better the customer service, the lower the store’s sales. Unable to explain their quantitative findings, the researchers initiated a second, qualitative study whereby the researchers worked as store clerks; attended a customer-service workshop; conducted over 150 hours of interviews with store executives, field supervisors, customer-service representatives and managers; and visited 40 of the 576 stores used in the sample. They also studied the sample’s most- and least-successful stores in depth. Applying their qualitative findings, they revised their original model, including the ordering of their variables, and reanalyzed their original data to find that a store’s pace—that is, whether it was busy or slow (reflected in line length and store sales)—predicted whether sales clerks could display positive emotions.

Reflecting on their experience, the researchers suggested that “scholarly knowledge is developed through alternating phases of induction (theory building) and deduction (theory testing). When empirical observations do not confirm a theory, investigators should embark on a new phase of theory-building so that they can revise or reject the inadequate framework and replace it with a new framework.” Qualitative research enabled the researchers in this study to create and test a revised model that better reflected the relationship between customer service and convenience store sales.

The third way in which qualitative research can help researchers to develop valuable theories is through offering data that, if collected and analyzed appropriately, are potentially rich and powerful. Critics who do not understand qualitative research will often say that “it has an n of 1,” meaning that qualitative studies represent a small sample that cannot be generalized to a wider population. However, by using frequency counts, qualitative findings can be coded into categorical variables that are analyzed and generalized using statistical techniques, such as log-linear analysis, for example (to determine the degree to which categorical groupings are associated with one another), or analysis of variance (to compare differences in categorical variables by an independent variable). Qualitative data can be used to create the grouping dependent variables used in discriminant analysis or logistic regression. Some recent organization-research analyzes qualitative findings in exactly these ways.

Finally, the fourth and perhaps most important way qualitative research helps to create useful theories is by teaching researchers the realities of life in the hospitality and restaurant industries. Nothing is more useful to understanding a phenomenon being studied than to be unobtrusively “hanging around” a site, interviewing employees and guests, and observing operations. Many researchers have spent their entire careers in academe, meaning that they pursued a master’s and doctorate degree following the receipt of their undergraduate degree, and along the way, obtained limited work experience—often in the form of consulting. Thus, while many well-trained researchers understand organizational problems in theory, they have little direct experience on which to draw.

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12 Ibid., p. 472.

Through being in the field collecting qualitative data, researchers can gain close to first-hand experience about a problem that is critical to the way they understand the phenomenon, shape their research model, and contribute to both the academic field and industry. While data-collection methods such as surveys and archival reports (e.g., annual reports, financials, press releases) are important to answering particular types of research questions, documents of that kind often allow the researcher to stay safely away from actual hospitality operations. By definition, qualitative research makes the researcher get into the trenches. It is an important training tool and represents one way for researchers to create useful new knowledge.

The Process of Qualitative Research

The process of qualitative research is guided by the researchers' purpose for the study (whether exploratory or explanatory), framing research questions, and methodology. While a discussion of the various methodologies is beyond the scope of this article, they can include the following approaches: grounded-theory analysis, deconstruction, discourse analysis, critical-theory analysis, case study, dramatism, narrative analysis, ethnography, feminist-based analysis, action research, and insider-outsider research. These methodologies are based on philosophical research traditions that frame researchers' assumptions about objectivity and their own biases. Such methodologies guide the ways in which data are collected and analyzed. Yet they are all based on the primary assumption that qualitative research is interpretive inquiry.

Collecting Qualitative Data

To obtain field interpretations, researchers employ a variety of qualitative methods, most of which fall under the rubric of either observation or interviews. Because the purpose of qualitative research is not to predict but to conduct a "search for understanding," its design is based on researchers' spending enough time with participants that the researchers begin to form interpretations of how a phenomenon is thought about in the field. Based on the researchers' analysis—and reanalysis—of such interpretations, they develop a theoretical model.

Collecting qualitative data requires researchers to immerse themselves in the field. Participant observation involves systematically describing events and interactions among people at the site. This method is a key way for researchers to "hear, see, and begin to experience reality as the participants do." Researchers trained in this form of data collection take extensive, unobtrusive, coded notes, which they immediately (within 24 hours) expand into detailed data descriptions that form the basis of a coding scheme. To ensure that the methodology has rigor, researchers must consider not only the influence of their presence on the respondents' behavior, but the way in which their own frameworks and biases may screen what types of data they see, hear, and collect.

In-depth interviewing, the other primary form of data collection, involves conducting structured or semi-structured discussions with participants. Usually researchers will prepare a set of interview questions to guide their conversations. Depending on the goals of their study, researchers may closely follow the interview protocol or they may use their protocol merely as a guide and encourage participants to expand on their responses to a question. Researchers trained in this form of data collection often tape-record their conversations with participants and, as soon as possible, transcribe their interviews into a format for data analysis. As an alternative, researchers incorporate open-ended questions into written surveys.

As a way to demonstrate the complexity of conducting a simple interview, researchers must consider the following issues: the varied language and culture of all participants; whom to sample (e.g., experts, outliers, groups, individuals); how to present oneself, establish rapport, and gain trust;


and how to ensure that the ethical rights of respondents are protected, including the right to informed consent, confidentiality, and protection from any harm.

Exhibit 1 summarizes the types of qualitatively based research purposes, questions, and methodologies and various forms of data collection. Note that within the framework of observation and interviewing lie many complex forms of data collection.

Qualitative-data Analysis
The goal of qualitative data analysis is to move from summarizing the data to identifying related themes and patterns, to discovering relationships among the themes and patterns, and to developing explanations for these relationships. This iterative, non-linear data-analysis process is complex, arduous, and often messy. Once researchers write out or transcribe their data, they first attempt to make sense of it (in a time-consuming process called content analysis). Depending on the pace of conversation, for example, one 30-minute interview can generate over 20 pages of transcribed data. It would not be unusual for a researcher to have hundreds and even thousands of pages of collected data after a series of interviews.

Coding. To appropriately interpret their data, researchers categorize their notes and transcripts, creating a coding scheme to organize concepts. Usually those categories are iteratively reviewed many times. To correctly reflect the data, some are collapsed into a common category, while others are discarded as inappropriate. The categories are also juxtaposed against one another to ensure that they are conceptually distinct. The categories that result are used to create overarching themes that guide the development of a theoretical model, in which researchers present a "logical chain of evidence." Qualitative software packages help code data and create categories of concepts, but the process can also be completed manually. Once researchers form their categories, they present counts that reflect the percentage or number of respondents who

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**EXHIBIT 1**

Qualitative-data collection methods

<table>
<thead>
<tr>
<th>Purpose of the study</th>
<th>Guiding research questions</th>
<th>Research methodologies</th>
<th>Data-collection method</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Exploratory</strong></td>
<td>• What is happening?</td>
<td>Grounded-theory analysis</td>
<td>Participant observation, field notes, filming</td>
</tr>
<tr>
<td></td>
<td>• What are the salient themes and patterns that emerge in participants’ meaning structures?</td>
<td>Deconstruction</td>
<td>Structured or unstructured interviews (group or individual, oral or written)</td>
</tr>
<tr>
<td></td>
<td>• How are these patterns linked?</td>
<td>Discourse analysis</td>
<td>Written stories of personal experiences and life histories</td>
</tr>
<tr>
<td></td>
<td>• What events, beliefs and attitudes are shaping this phenomenon?</td>
<td>Critical-theory analysis</td>
<td>Social-network diagrams</td>
</tr>
<tr>
<td></td>
<td>• How do these forces interact?</td>
<td>Case study</td>
<td>Recording of kinesics and proxemics</td>
</tr>
<tr>
<td></td>
<td>• To investigate little-understood phenomena</td>
<td>Dramatism</td>
<td>Historical analysis</td>
</tr>
<tr>
<td></td>
<td>• To identify important constructs</td>
<td>Narrative analysis</td>
<td>Researcher accounts of involvement in a change initiative</td>
</tr>
<tr>
<td></td>
<td>• To explain the relationships between the phenomena in question</td>
<td>Ethnography</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• To identify a causal or process model</td>
<td>Feminist-based approaches</td>
<td></td>
</tr>
</tbody>
</table>


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provided answers reflective of those groupings. Using various statistical analyses, the categories and their respective counts can be used to test hypotheses.

As mentioned, analyzing data and creating themes that accurately reflect and juxtapose all respondents' perspectives can be complex. Researchers spend many hours looking back and forth between their data and the categories they created from this data, to ensure that they are correctly reporting their findings and restraining their own biases. Often a researcher has other analysts review the data and create a coding scheme with which to compare and resolve discrepancies. Researchers also review a portion of their findings with the study's participants to check for accuracy of interpretations. The goal of data analysis is to "accumulate knowledge... through the formation of ever-more-informed and sophisticated constructions."19

Validity and Accuracy Checks

While many researchers are skilled at qualitative research, unfortunately some do perform it without adequate training. As study participants, managers will want to make sure that data are collected and analyzed appropriately—in other words, that they have "interpretative validity."20 Some of the questions to ask researchers both at the outset and completion of the study include the following:

(1) To establish the study's credibility: How accurate or "truthful" are the findings of this study? What criteria can we use to judge them?
(2) To establish the study's transferability: How applicable might these findings be to other groups or settings?
(3) To establish the study's dependability: If we were to replicate this study with the same participants would we obtain the same outcome?
(4) To establish the study's confirmability: How do we know the findings represent the viewpoints of the respondents and, to the degree possible, are not representative of the researchers' viewpoints, frames of reference, or prejudices? (This question helps researchers to acknowledge their own inherent biases.)21

These questions replace the traditional validity, reliability, and generalizability checks that guide most forms of quantitative research. Given its interpretative nature, an important goal of qualitative research is to demonstrate the trustworthiness of the findings. Unlike quantitative studies, where researchers claim to hold the objective perspective of the "disinterested scientist," qualitative researchers work from a tradition which recognizes that all research findings are interpretative and that the researchers are engaged participants, performing "multi-voice reconstruction."22 Thus, to build credibility, researchers address the four questions above and, in doing so, make their data-collection methods and analyses detailed and explicit.

Getting the Most from a Qualitative-research Study

Properly executed qualitative research can offer valuable findings for hospitality managers. As was recently stated in an academic journal, "a qualitative study that systematically compares similarities and differences in patterns of interactions, the resulting meanings of key variables, and their influences on various organizational outcomes... might reveal important setting factors and dynamics that influence and are influenced by employees' perceptions."23 In other words, qualitative research, by design, can capture insights from the field and specifically examine their implications for ways that organizations strategize, exploring both the creation and consequences of management initiatives. Yet to obtain the most insightful findings, researchers need managers' help. This form of research represents a way for researchers and practitioners to collaborate to create new knowledge that is fueled by an organization's needs and realities—and provides

19 Guba and Lincoln, p. 114.
22 Guba and Lincoln, op. cit.
23 Bartunek and Seo, op. cit.
meaningful, useful results. In this final section, I explore the challenges in working with academics to obtain the highest return for managers' time and commitment to a qualitative-research project.

The Complexity of a Simple Concept

In the organizational behavior literature, a great deal is written about the value to managers of working with researchers. Yet most of those writings are prescriptive and contain mostly opinions. For example, a recent call for empirically based papers on knowledge transfer between academics and practitioners resulted in 41 responses, but 16 of those papers contained the authors' positions with no supporting data.24 (Those articles were returned without being reviewed.) The editors termed this phenomenon "claims in search of evidence." Then, only 25 submissions remained in contention—a small number for such an important topic in an applied field. This statistic suggests how difficult it is for academics and practitioners to collaborate well on research. Some cite academics' and practitioners' different frames of reference, which are shaped by their differing value systems, as the culprit.25 Others suggest that the two groups have different goals. According to that argument, academics seek new understandings, while practitioners seek useful information that they can use to shape their decisions.26

There is no reason that those two goals must be mutually exclusive. The challenge of qualitative research is to create a working collaboration that contributes to both groups' disparate frames and goals. In an article titled "Doing Research that Is Useful to Practice: A Model and Empirical Exploration," the authors suggest: "the usefulness of research depends in part on the extent to which the perspectives of organization members are included in the research process and the results are incorporated into those members' organization-design activities. ... There [need to be] opportunities for researchers and members to take each others' perspectives and to jointly participate in interpreting the results of the research."27 Qualitative research seeks to do that through uncovering respondents' in-the-field tacit insights, formally explaining them, and, in the process of creating new knowledge, offering practical insights that can be embedded into new routines for the organization.28 This practitioner-to-academic-back-to-practitioner model can work to meet both groups' needs and simultaneously serve the hospitality field.

Getting Involved in Qualitative-research Studies

Knowledge creation and transfer is a social, dialectic process, in which differing perspectives emerge and new ones are jointly created through dialogue between and within groups.29 Managers are urged to become involved in the research process. To contribute to and benefit from research findings, managers are encouraged to go beyond merely letting a researcher collect data and generate a report, and instead to discuss the tensions faced between the academic's desire for theoretical insights and the manager's need for solutions to problems. Moreover, managers are encouraged to be active in how the data are collected and analyzed, as well as how results are interpreted and applied, recognizing that reflection with academics is crucial to creating a collaborative learning process.30

This advice is echoed by the findings of a joint academic-practitioner team, headed by a well-respected Harvard researcher. This group formed a three-year collaboration to examine the factors

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28 Rynes et. al. op. cit.
29 Ibid.
which influence creativity in long-term corporate projects. After reflecting on their experiences, the team offered the following advice to both researchers and managers:

1. To the extent possible, create a collaborative research team or relationship where each member brings a diverse, yet complementary skill set and background, and at the same time a similar passion of interest and a willingness to work with people who hold different perspectives.

2. Make sure commitments, roles, and responsibilities are clarified at the outset of the project. Revisit and revise these understandings as necessary.

3. Establish regular forms of facilitated communication. Push early for preliminary results on which to reflect and discuss.

4. To build trust and mutual understanding, find ways to get to know team members as people, outside of work.

5. As a team, regularly reflect on the effectiveness of the collaboration. Build in occasions for team members to share their experiences and perceptions.

No doubt, those suggestions make working with researchers appear to be a daunting endeavor, but it can also be exciting. The simple process of articulating a problem or challenge to an outsider—who can listen but does not need to respond—often leads to a more nuanced understanding for the person facing the problem. By actually taking on an active role—in which the researcher and manager weave together different, but equally important inputs and jointly discover new insights—the manager not only improves organizational performance, but, on a personal level, often learns that the most powerful learning and creative leaps occur in collaboration. Qualitative research has the potential to provide managers with the richest return for the problem at hand, but, more important, for enhancing their decision-making and intuitive skills. Most of all, it represents one way for managers to participate in creating something new that extends beyond the organization and guides the industry to new levels of understanding and performance.

A Key Merger of Talents

In this article, I explored the process of qualitative research, its role in creating new knowledge for the hospitality industry, and ways that managers may wish to contribute to research projects to help ensure its rigor and usefulness. Managers and researchers are encouraged to contribute jointly to projects and, together, to interpret and apply results. If conducted appropriately, qualitative research represents an exciting venue for creating new, useful knowledge in a manner that serves both researchers and practitioners’ divergent needs. It represents a key way for practitioners and academics to merge their talents, expertise, and passion in support of advancing the science of the hospitality industry.

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