

Choosing participants

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Introduction

This chapter is concerned with the challenges of choosing participants for qualitative research. The choice of 'choosing participants' for the chapter title, rather than 'selecting a sample', is important for three reasons. Firstly it signifies the focus of the chapter is wider than just the techniques for selecting samples, including challenges such as accessing participants, justifying, and reporting their choice. Secondly the use of the term participant, rather than the frequently used alternatives of 'case' or 'element' (Saunders et al., 2016), emphasises that we are concerned with choosing people who in almost all cases will be asked if they consent to participate. Finally the phrase highlights implicitly that, albeit occasionally, it may be possible to choose all potential participants in a target population rather than a sample (Saunders, 2012).

Usually within qualitative research in business and management, our choice of research participants involves choosing and gaining access to a small sub group or sample from a larger target (that is bounded) population comprising the potential participants who are the focus of our research (Miles et al., 2013). Our choice and the subsequent gaining of access are, invariably, fraught with problems and subject to challenges. Although ideally we may wish to collect data from particular participants, this will depend upon being able to gain access to these people. Even for participants within organisations where physical access to collect data has been granted, there will still be a need to maintain this access and engender cognitive access with each participant. Additionally, the time and financial resources we have available for our research may also constrain the data we will be able to collect and subsequently analyse; again highlighting the necessity to choose a sub group of participants (Saunders et al., 2016).

Our chapter takes as its starting premise that the research aim and objectives inform the research design (Brinkmann and Kvale, 2015); in other words that our research method, and as part of this the research participant or participantss that we chose, need to enable the research question to be answered (Saunders et

al., 2016). Within this we recognise that, for more orthodox qualitative research relying on propositional knowledge from the literature, research questions will usually be reasonably well defined. In such situations the characteristics of potentially suitable participants are relatively easy to establish. In contrast, for more emergent qualitative research such as that where the research idea is derived from naturalistic settings (Patton, 2015), these are likely to be more open, even though there will still be research questions. For such emergent research the characteristics of suitable participants are likely to need to be, at least in the early stages of the research, defined more broadly and driven subsequently by emergent theory.

In writing this chapter we have, whilst recognising the plurality of philosophical positions and heterogeneity evident in qualitative research in Business and Management (Johnson et al. 2006), adopted a broadly pragmatist philosophy. Our aim is to highlight and discuss a number of potential challenges that we consider qualitative researchers, whatever their philosophical position, may need to consider when choosing participants. In so doing we hope to offer knowledge that can be of utility to the practice of qualitative researchers. Within this stance we conceptualise useful knowledge as that which facilitates successful action through creating solutions to problems, informing future practice (Dewey 1908 [1977]; Saunders et al., 2016). To this end we highlight four challenges (problems) associated with choosing participants and indicate potential credible, well-founded and reliable solutions that can inform practice (Wicks and Freeman, 1998).

Taking a processural view we commence with the challenge of gaining access to potential participants and associated organisational issues and pressures for methodological rigour (Van De Ven and Johnson, 2006). This is followed by a consideration of the challenge of choosing one or more suitable participants who can provide what Alvesson and Ashcraft (2012: 240) refer to as “reliable gateways” into the practices of business and management. Within this we consider the utility of different non-probability and probability sampling techniques focussing in particular on the former. Our third challenge concerns how many participants will be sufficient for the research to be considered authentic and credible by its consumers (Baker and Edwards 2012). In discussing this we consider both the planning and reporting of qualitative research considering expert opinion, empirically grounded advice, and question the appropriateness of the apparent “gold standard” (Guest et al., 2006: 60) of data saturation. Our fourth challenge concerns the reporting and justifying of participant selection and meeting the expectation of transparency within this (Robinson, 2014). Interwoven through these four challenges is the need to act ethically and ensuring participants’ rights are respected. Our chapter closes with a summary of the challenges raised, which we believe all business and management researchers need to take heed of when choosing participants.

The challenge of gaining access

Collection of primary data in qualitative business and management research almost invariably depends on first gaining, and subsequently maintaining, access

to participants. Within the literature access is considered at three levels: first, the gaining of physical, or in the case of Internet mediated research virtual, access to organisations, groups or individuals; second, the subsequent maintenance of this access; and third, achieving cognitive access with each participant (Saunders et al., 2016). Although considered in research methods and methodology texts, these aspects of gaining access are, as we discuss in our fourth challenge, rarely reported in journal articles. Yet for all research these levels of access are crucial as, if permission to collect data is denied, the choice of participants is immaterial.

As researchers in business and management, our position is weak compared to organisations, groups and individuals from whom we are seeking to collect data (Lee, 1993), as we have relatively little to offer in return. Organisations and groups are likely to receive numerous requests for such access rarely agreeing to more than a few, if any of these. Our request to gain physical or virtual access to collect data is therefore one of many they receive and, even if considered, may fail to interest the gatekeeper or broker who controls such access resulting in a refusal. Such refusals can be for a number of reasons related to the perceived value of the work to those granting access, the time required of participants, the sensitivity (however defined) of the topic to the gatekeeper and potential participants and associated issues of confidentiality, and perceptions about the researcher's credibility (Arksey and Knight, 1999, Saunders, 2012). In addition organisations or groups may find themselves in situations where, owing to external events unrelated to their perceptions of the research or the researcher, they are unable to offer access.

Such difficulties with gaining physical access result in many business and management researchers adopting (although unfortunately few explicitly report) an opportunistic approach (Buchanan et al., 1988 [2013]) to gaining access. Access to organizational gatekeepers is, usually, brokered through friends and colleagues (Okumus et al., 2007; Saunders, 2012) and can be thought of, in sampling terminology as gaining access to the target population that will be the focus of the research (Kervin, 1999) from which participants will be chosen. Although the granting of such access invariably includes an element of chance (Okumus et al., 2007), it is to a large extent dependent upon the quality of the researcher's networks, careful preparation both in terms of understanding the specific organization or group and their likely requirements of a researcher, and being able to explain clearly how the research design will be applied in their particular context. Initial discussions with friends and colleagues are, combined with information derived from secondary sources such as organisations and groups web pages likely to be helpful in this regard. These discussions may also highlight the need for potential compromise in the research design.

The potential need for compromise when gaining physical access highlights a particular challenge emphasised by the on-going rigour and relevance debates. These point to a need for business and management research to be both theoretically and methodologically rigorous, and at the same time embracing the world of practice and being of practical relevance (Hodgkinson et al., 2001; Wenseley 2011). Organisational or group requirements to grant access can lead potentially to the researcher compromising on methodological rigour (Van De

Ven and Johnson, 2006), in order to be able to collect data. This conflict is summarised by Buchanan et al. (1988 [2013]: 53-4):

“Fieldwork is permeated with the conflict between what is theoretically desirable on the one hand and what is practically possible on the other. It is desirable to ensure representativeness in the sample, uniformity in interview procedures, adequate data collection across the range of topics to be explored, and so on. But the members of organisations block access to information, constrain the time allowed for interviews, lose your questionnaires, go on holiday, and joining other organisations in the middle of your unfinished study. In the conflict between the desirable and the possible, the possible always wins.”

Access from the researcher's perspective is a continuous process, rather than an initial or single event (Marshall and Rossman, 2011; Okumus et al., 2007). Indeed, McDonald et al. (2009) remind us that even in funded and supported industry-based research 'access' does not assure 'on-going access', it is rather an 'incremental continuum' (Walford, 2001). Such physical or virtual access, particularly for emergent research can be iterative and incremental. Access commences when we first gain permission to carry out an initial exploratory part of our research. As the research focus and question are refined and become more precisely defined we seek further access to undertake other aspects. In other designs, including both emergent and orthodox qualitative research, we may need to collect data over a period of time emphasising the importance of an on-going relationship with participants. Consequently, once physical access to an organisation has been achieved, this on-going relationship with participants, and organisational gatekeepers, need to be maintained.

Despite physical or virtual access having been negotiated, it is still usually necessary (other than for covert research) to gain acceptance and informed consent (cognitive access) from participants other than those with whom physical access was negotiated. Wherever a potential participant refuses to take part, this may reduce the likelihood that we can collect the data we need to answer our research questions (Robson, 2011). Leverage saliency theory (Groves and Couper, 1998), although originally developed in relation to survey research, can also offer useful insights to gaining cognitive access in qualitative research methods (see: Cachia and Millward 2011). It reveals that, although some aspects of potential participants' decision to consent are outside the researcher's control, others such as the giving of advanced notice, incentives, university sponsorship and relevance of the topic can increase the likelihood of the participant consenting. In particular it emphasises the importance of personalising the request to take part, offering convincing assurances of anonymity and addressing each participant's "idiosyncratic concerns" (Groves et al., 2000: 299). Requests to take part may therefore have different outcomes depending upon the degree to which each potential participant's specific concerns are addressed, and aspects with which they identify positively can be leveraged (Maynard et al., 2010); without them being coerced.

Research ethics rightly highlights the importance of not using coercion, and the importance of providing potential participants with the opportunity to make an informed choice regarding whether or not to take part; emphasizing that deception in any form is rarely considered acceptable (Bell and Bryman, 2007). Yet, we note that gaining informed consent can in contexts such as researching corruption or illegitimate or covert practices reduce the likelihood of participation (Myers, 2013). In such situations Punch (1986) argues deception may be acceptable where data are not accessible by other means. However, whilst informed consent is, in most contexts crucial to the collection of data, it remains of limited utility unless participants are able and willing to provide data that will enable the research question to be answered. Indeed it can be argued that collecting data from participants that is of no value to the research is unethical as it is wasteful of their time. This leads to our next challenge, how to choose participants whom can provide data that will enable the research question to be answered.

The challenge of choosing one or more suitable participants

Within qualitative business and management research one or more participants are chosen on the basis that the data they will provide will be sufficient to enable the research question to be answered. In other words, the data will provide reliable gateways into the practice of business and management. This means the chosen participant or participants need to be suitable to our research (we will consider the challenge of how many participants are sufficient in a subsequent section!). Suitability, in relation to participants, is often used to refer to how those chosen and the data collected from them represent a larger population to which they belong (Becker, 1998). However for some ontological positions (and research questions) such representation may be considered an inappropriate concept. It also has distinct and differing connotations depending upon whether non-probability or probability sampling techniques are used (Saunders et al., 2016). Although we recognise probability sampling techniques are used infrequently in qualitative research, we still consider it worthwhile to mention them briefly. We note it is rarely feasible to either collect data from sufficient participants to meet assumptions for statistical analyses or appropriate to use such analyses, other than in certain complex mixed methods research designs (Nastasi et al., 2010). However, it is still possible to collect data for qualitative analyses from participants chosen at random (Brinkmann and Kvale, 2015). Within this section we therefore begin by considering, albeit briefly, the differences between probability (random) and non-probability (non-random) sampling techniques and their utility in qualitative business and management research. We then focus on non-probability techniques and, in particular, the challenge of deciding which characteristics are relevant to choosing potential participants, and the associated sampling techniques to choose participants that can provide reliable gateways to the data.

Non-probability and probability sampling and representation

For both non-probability and probability sampling techniques, the challenge is to choose one or more participants that will enable us to answer our research

question. Where the focus is on gaining understandings and insights that enable information rich (Patton, 2015) rather than statistical explanation, non-probability sampling techniques are likely to be used and qualitative data collected. Using one or more of these techniques individual participants are chosen on the basis of the researcher's judgment regarding their likely utility. They may therefore comprise, for example, participants considered extreme, unusual, critical, or typical, as opposed to being similar to the target population.

In using non-probability sampling techniques, either on their own or in combination, we actively choose the participants to include in our research, the choice of participants being driven by a non-positivistic epistemology. By choosing certain participants, we are excluding all other potential participants in our target population. As a consequence some of the target population will have a chance of being chosen as participants while others will not. In both orthodox and emergent designs our choice of participants is usually not wholly pre-specified, selection of participants evolving after fieldwork has begun and often being conceptually (theory) driven (Miles et al., 2013). Participants will be chosen for a range of reasons such as gaining new insights into phenomena, enabling phenomena to be assessed in a new manner, or to support the development of new understandings from which (dependent upon the research question) new theories may be developed (Miles et al., 2013). Where such theoretical generalisations are developed, they are based on analytic generalizability, reasoned judgement being made regarding their transferability to other situations. Invariably, the use of non-probability sampling techniques precludes generalising statistically about a target population, although we note that quota samples are used (primarily in quantitative survey based research) as a substitute for a probability sample, where a sampling frame is not available (Baker et al., 2013).

As intimated earlier probability sampling techniques can be, although rarely are, used in qualitative research. Whilst some (e.g. Miles et al., 2013) note their use can add credibility where the number of potential participants chosen purposively is too large, it can also be argued such techniques are epistemologically incompatible with qualitative research (Eby et al., 2009). Probability sampling techniques are normally used to select participants where the focus is gaining understandings and insights that are statistically generalizable to a target population. Sufficient participants are selected at random to represent the target population, the sampling technique or techniques being adopted to ensure those chosen are as similar as possible to that population. Random selection eliminates the researcher's judgment from the actual choice of individual participants. Subsequently collection of quantitative data from comparatively large numbers of participants allows statistical inferences to be made.

Probability sampling techniques select each participant from a sampling frame (complete list) of all potential participants within the specified target population. If it is not possible to obtain or create such a list, then such techniques cannot be used, as it will not be possible to specify the probability of each participant within the target population being selected. The utility of data collected from a

probability sample depends, in part, upon the accuracy with which the participants selected represent the target population (Barnett, 2002). It also means that if, for example, the data are collected from a sample of employees (participants) from one organisation (the target population), although it is possible to generalise theoretically beyond the target population, we should not generalise statistically to other, or indeed the total population of all, organisations. However, given the relative lack of use within qualitative research, we will not consider these techniques further.

Non-probability techniques

Within the literature a wide range of non-probability sampling techniques are identified; Miles et al. (2013) for example list 16, whilst Patton (2015) outline 40. Each offers predetermined selection criteria for participants, the challenge being to use those that are most relevant to the research question. Those techniques that are often used in qualitative research can be grouped into three types, purposive, volunteer and haphazard; alongside a fourth, quota sampling, which is used primarily in quantitative research. We summarise those most widely used by qualitative business and management researchers in Table 1.

Table 1: Utility of frequently used non-probability sampling techniques

Type	Sampling technique	Nature of participant(s) chosen	Potential relevance to a research question
Purposive – choice of participants based upon the researcher’s judgement	Heterogeneous	diverse characteristics, maximum variation	participants reveal or illuminate key themes
	Homogenous	similar characteristics, limited variation	participants reveal or illuminate depth, minor differences apparent in key themes
	Theoretical	as needed on basis of developing categories	participants cumulatively test emerging theory
	Typical case	normal or usual, not definitive	participant(s) provide an illustration, rich account
	Critical case	crucial to what is being researched	participant(s) important or can make a point dramatically
	Extreme case	extreme or unusual	participant(s) reveal the most, relevant to understanding the more typical
	Opportunistic	as revealed	participant(s) allow new leads to be followed
Volunteer – choice of participants based on those who offer to take part	Politically important	salient and connected	participant(s) attract attention (excluded to avoid undesired attention)
	Snowball (chain)	similar, identified by existing participants	participants are difficult to identify
Haphazard – choice based on convenience of access	Self-selection	strong feelings about research questions, self identify to take part	participant(s) willing to devote time
	Convenience	unclear, other than willingness to take part	participant(s) readily available, easy to access, save resources

Purposive techniques, where participants are selected on the basis of the researcher's judgment regarding relevance to answering the research question are the most widely used in qualitative research (Miles et al., 2013). These techniques bring to the forefront the challenge of choosing a participant or participants who will enable the research question to be answered. Like the other non-probability sampling techniques they are normally used to choose a small number of participants who will, hopefully, be particularly informative. Equally though, the ingenuity and flexibility of good researchers allows these challenges to be addressed in innovative ways that progress the data collection process (see: Ellem, 2009; Price and Townsend, 2009).

Heterogeneous and homogenous sampling techniques are used to select a small group of participants, rather than just one. Heterogeneous, or maximum variation, purposive sampling relies on the researcher's judgement to first identify relevant diversity characteristics as criteria and then choose participants that meet these criteria to provide maximum variation in the data collected. These variations are argued to represent the strength of this technique, as any patterns that emerge from the data are likely to represent the key themes and should allow them to be both described and explained (Patton, 2015). In contrast, homogenous sampling relies upon the researcher's judgement to identify one particular relevant group or sub-group and then choose participants from within. The data collected from participants is therefore likely to be similar allowing for both greater in-depth exploration and minor differences to be more apparent.

Theoretical sampling represents a special case of purposive sampling, particularly associated with Grounded Theory, in which participants are chosen cumulatively to support inductive theory development (Corbin and Strauss, 2015). The researcher relies upon her or his judgement to decide initially from where to choose participants, rather than what to choose them for. Subsequent participants are chosen to inform and test concepts that appear relevant to the emerging theory and evolving storyline that is being derived from simultaneous collecting, coding and analysis of the data.

Other forms of purposive sampling (Table 1) address the challenge of choosing either one or a small group of participants with specified characteristics for a variety of distinct purposes. Typical case purposive sampling relies on the researcher's judgment to identify participants who, within the context of the research, can be characterised as normal or usual and used for illustrative purposes. As such the participant or participants chosen may be considered representative, although not in a statistical sense. In contrast, critical case sampling relies on the researcher's judgement to select one or more participants on the basis that they are important to answering the research question or can be used to make a point dramatically. Patton (2015) offers a number of clues that suggest a critical case. These relate to whether a potential participant is crucial to the operation of what is being researched or, alternatively, can provide a vibrant illustration. In addition they can be chosen to provide supportive

evidence of the possibility of something occurring. In contrast, extreme case purposive sampling relies on the researcher's judgement to choose one or more unusual or extreme participants on the basis that such data, when collected, will offer more insights that can be used to answer the research question. This is derived from the premise that findings from extreme cases will be relevant to understanding or explaining more typical cases.

Opportunistic purposive sampling acknowledges how, within qualitative research, the unexpected can occur, for example new leads arising once research is underway. As such it relies on the researchers judgement to recognise and decide regarding whether or not to take such opportunities. Miles et al. (2013) notes that choosing additional participants opportunistically can benefit inductive theory building. We consider openness to the unexpected and potential new leads is important more widely within qualitative research, particularly within abductive approaches. In contrast politically important purposive sampling relies the researcher's judgment regarding anticipated politically sensitive issues and associated outcomes when deciding whether to include exclude one or more prominent potential participants.

Snowball sampling is the first of two techniques where the researcher chooses participants from those who either volunteer or are volunteered to be part of the research (Table 1). It relies on existing participants to identify further potential participants, and so is considered particularly useful where the target population and thus potential participants are difficult to either physically locate or, alternatively, identify. Initially the researcher relies on her or his judgement to choose an initial participant. That participant identifies other participants from the same target population and supports the gaining of access. Each in turn identify further potential participants who are similar to themselves resulting in what is likely to be a homogenous sample (Lee, 1993). our second volunteer technique, self-selection sampling, occurs when, in response to the research being publicised, one or more potential participants self identify and volunteer to take part. Those who do are likely to have stronger feelings or opinions about the research and consider it important or interesting. Providing such potential participants are considered suitable, the researcher's judgement regarding which media (be it online or traditional) to use to advertise for potential participants will determine the characteristics of those likely to volunteer.

Haphazard sampling occurs when one or more participants are chosen without any obvious reasoning that relates to the research question, the most common form being convenience sampling. This involves the researcher in choosing participants because they are readily available or convenient to access. Although some research texts argue that using this form of selection whilst saving money and effort does so at the expense of data and credibility (Miles et al., 2013), we contend this may not necessarily be so. Where the target population of potential participants contains little variability, choosing one or more participants on the basis of convenience rather than some other form of non-probability sampling is unlikely to have a major impact (Saunders, 2012). In addition, a target population that may be 'convenient' to access, perhaps due to an existing

relationship, may still meet other criteria judged more relevant to answering the research question.

The challenge of how many participants will be sufficient

Throughout this chapter we have been careful to refer to both a 'participant' (singular) and 'participants' (plural). This is because for some qualitative research questions one participant can be sufficient (Becker, 2012; Patton, 2015). The challenge of sufficient participants comprises two inter-related aspects. The first relates to the planning (design stage) of qualitative research, when it is often necessary to have some idea regarding how many participants are likely to be needed to enable the research question to be answered. The second occurs during data collection and analysis and relates to the number actually being sufficient to both provide the depth and breadth of salient information to answer the research question and be credible to others. In general terms, the number considered sufficient therefore depends on a balance between the research purpose, saliency of data obtained, what is considered numerically credible by the researcher's community, and the researcher's epistemological and ontological positions (Saunders and Townsend, 2016).

Advice regarding our first aspect, how many participants are likely to be needed within qualitative research is, compared to that for quantitative research, limited. Some texts, emphasising the open-ended and often exploratory nature of qualitative research, argue that data collection should continue from further participants until saturation (Morse, 1994) or information redundancy (Lincoln and Guba, 1985) is reached. Even putting aside arguments that saturation may not an appropriate way of establishing sufficiency (discussed later), such advice is problematic when it is necessary to have an idea of the number of participants who are likely to need to be chosen at the design stage.

Few authors, and none we could find within business and management, offer empirically based advice regarding when saturation is likely to be reached. One of the most widely cited studies (Guest et al., 2006), draws on a study of 30 Nigerian and Ghanaian women with HIV, commenting that six to 12 interviews should be sufficient to reach saturation with a relatively homogenous population. Similar numbers are reported by Francis et al. (2010) and Marshall (1996) in studies of saturation using medical leaders, practitioners and patients, these ranging from 13 to 15. More generally, Onwuegbuzie and Leech (2005) advise the number should not be so small that it is difficult to obtain data saturation and yet, not too large to make in-depth analysis difficult. Kuzel (1992) notes the number required for saturation is likely to differ depending on whether the target population (and the participants to be chosen) is homogenous or heterogeneous, others highlighting the number will also differ between research strategies. Morse (1994) for example, advises between 30 and 50 participants for ethnographic studies whereas Creswell (2007) suggests between 20 and 30 participants for a Grounded Theory study.

Whilst some consider saturation to be a "gold standard" for establishing whether the number of participants is sufficient in qualitative research (Guest et al., 2006:

60), others consider it inappropriate. They argue that where saturation is not reached, this means that the phenomenon has yet to be fully explored, not that findings are invalid (O'Reilly and Parker, 2013). Choosing additional participants and collecting data until saturation is reached implies the number needs to be sufficient to reveal or illuminate key themes implying a need for analytic generalizability. Yet this is not appropriate for research questions such as establishing whether something is possible, or providing a rich account of the particular (Baker and Edwards, 2012). For such research questions a single participant, carefully chosen, may well be sufficient (Merriam, 1995; Passerini, 2012). Others (for example Baker and Edwards, 2012), note that different disciplinary communities have different norms regarding the number of participants considered sufficient for qualitative studies, our own review of over 240 empirical articles using interviews in organisation and workplace studies revealing less than four per cent mentioned using data saturation (Saunders and Townsend, 2016).

More general advice regarding the likely number of participants regarded to be sufficient for qualitative research is also limited, consideration of the issue being buried away (Baker and Edwards, 2012). Summarised in Saunders (2012) as between four and 12 participants for homogenous and between 12 and 30 for heterogeneous groups, much of this advice comprises opinions, albeit drawing on experience. This is surrounded by methodological and practical caveats alluding to differences between groups, different research strategies and complexities and the research question. Whilst noting the impossibility of expressing precise numbers prior to inception such advice also recognises a need to often provide an indication at when planning. To this end Adler and Adler (2012) note that whilst the number of participants can vary from one to a 100 or more, and advise between a dozen and 60 for a qualitative research project. This concurs with our own advice based upon our review of organisation and workplace published research practice (Saunders and Townsend, 2016). Drawing on what has been deemed acceptable by editors and reviewers, we suggest that when planning such research initial estimates of 30 participants if analysing as a single, and 50 if analysing as multiple groups are likely to be credible. We also offer a broad overall norm of between 15 and 60 interview participants. We recognise that for some qualitative researchers the suggestion of such norms might be considered controversial. However, from our pragmatist philosophy, we consider such norms can be helpful providing they are considered as guidance offering insights rather than providing regulations to be followed. The actual number of participants will be dependent upon the research question, saliency of data and the researcher's epistemological and ontological positions. Consequently a single qualitative interview can be sufficient and credible for some research purposes (Saunders and Townsend, 2016).

The challenge of reporting (and justifying) participant selection

Much of the advice and guidance reviewed in the previous section emphasizes a need for transparency by reporting and justifying participant numbers in qualitative research. Although a few researchers, notably Janesick (2000),

contend that a preoccupation with justifying method can detract from the story being told, the majority consider it important. They argue such reporting will help the sufficiency of participants and authenticity and credibility of the research to be evaluated (Lincoln and Guba, 1985; Curtis et al., 2000); where appropriate allowing others to adopt the design as a basis for similar studies (Baker and Edwards, 2012). Such justification it is argued can take the form of data saturation, citing to previous similar studies, or referring to expert opinion (Francis et al., 2010; Guest et al, 2006; Marshall et al., 2013).

Despite this perceived importance, two studies from School Psychology (Safman and Sobel, 2004) and Health Sciences (Collins et al., 2006) reveal only 60% of research articles reviewed reported the number of participants rarely providing justification. In relation to information systems, Marshall et al. (2013) note, that for those studies reporting the number of participants, justification was either by superficial reference to data saturation or omitted entirely. Furthermore, Onwuegbuzie and Leech (2007: 115-6) comment: “many qualitative researchers seemingly select the size of their samples in an arbitrary fashion”.

Our own research (Saunders and Townsend, 2016) reveals, in relation to qualitative interviews, over 80 per cent of organisation and workplace researchers provided at least some indication of their number of participants, over three quarters stating the precise number as part of a more detailed description of participants’ characteristics. Invariably for some, particularly ethnographic, studies it was not possible to state a precise number although for these a detailed description of process was still offered as part of the method. However, only half of the organisation and workplace studies stating the number of participants provided some form of justification, all doing so either implicitly or explicitly by relating the number of participants chosen to the study purpose. Other (additional) forms of justification such as data saturation, citing expert opinion or previous research were used rarely being reported in less than five per cent of studies. This was not something we had anticipated, believing that researchers would, justify the number of participants selected in some manner. Hence we raise the need to both report and justify the number of participants as our fourth challenge, as yet partially unmet by many qualitative researchers within business and management research.

Discussion

Within this chapter we have, taken a processural view to highlighting challenges when choosing participants in qualitative research. We have focused our attention on four key challenges within the process: gaining access to data; choosing suitable participants (principally using non-probability sampling techniques); determining appropriate participant numbers; and the reporting and justifying the participant selection. Qualitative research as an experience and as a means of understanding phenomena can be richly rewarding and informative. It does however present the researcher with a range of challenges, each which can be overcome with planning, contingencies, and flexibility from the research team. Researchers should set out at the start of their project

“planning the worst, yet all the while hoping and working for the best possible outcome” (McDonald et al, 2009: 134).

Gaining access can be a challenging process but importantly, it is also an on-going process. A range of informal and formal networks may play a role in gaining access and the researcher must tread warily adhering to both institutional and professional standards of ethical research practice. Importantly, negotiating access is not a one-time activity. Researchers must continually negotiate access throughout the research period, recognising that maintaining strong relationships can provide the researcher with the opportunity to return for additional data collection at a later stage.

Within business and management qualitative research we generally utilise non-probability sampling techniques. One consequence of this is that while some in a target population will have the opportunity to be selected, others will not. Although this means statistical generalisations cannot be drawn, such generalisations have never been an aim of qualitative research. Qualitative research allows us as researchers to dig deeply and understand business and management phenomena, purposive techniques tending to be the most widely used to choose participants (Miles et al., 2013). Yet non-probability sampling techniques are an area that those who oppose qualitative research may point to as a methodological weakness. Whilst such techniques are rigorous, those used need to be documented clearly.

A common question within the wider qualitative research community is ‘how many interviews are enough?’ (Baker and Edwards, 2012), yet answers to this common question are rare and often imprecise. This is the nature of the qualitative research process; and for some researchers the suggestion of an even broad overall norm might be considered controversial, or perhaps sacrilege. Yet, organisations, which plan to commit resources to research projects, will often seek an indication regarding the likely resources required. Hence, it is important that the researcher has a plan including an idea of the potential number of participants before they begin to collect data. However, in reviewing advice comprising both guidance and norms, we reemphasise that these are derived from what has been deemed acceptable by others such as editors and reviewers (Saunders and Townsend, 2016). We also reemphasise the actual number of participants for a research study is dependent upon research purpose, saliency of data and the researcher’s epistemological and ontological positions, and that for some purposes one interview can be sufficient.

When asked why articles are rejected journal editors commonly point to problems with the method (Daft, 1995; Clark et al., 2006). While clear description, more detailed explanation and justification can assist in this area, it may create a problem of space for the author. Qualitative researchers need to ensure there is an ample justification and explanation of the participants chosen without sacrificing the quality of the data presented.

While many qualitative researchers appear to make sample size selections in an “arbitrary fashion” (Onwuegbuzie and Leech, 2007: 116), it is also possible that

many plan very well based on published research. Methods sections of published journal articles, offer little detail in terms of explaining and justifying the selection of participants (Saunders and Townsend, 2016). At best they tend to comprise general statements of process and limited details of participants when publishing. We are of the view that the qualitative research community needs to provide more. Acknowledging there are alternative arguments, we consider it crucial to know how data are collected and analysed as a means of, firstly, providing some greater credibility and integrity around the process for both scholars and practitioners, and secondly, to provide tacit training for new and emerging scholars in the field. We suggest therefore that qualitative researchers should as a minimum provide a clear description of their participants, how and why they were selected and the number; and of course, how they enable the research questions to be answered.

Conclusion

Within this chapter we have outlined four challenges faced by qualitative researchers in business and management when choosing participants. The first of these was the challenge of gaining access to potential participants highlighted both organisational issues and pressures for methodological rigour. The second, the challenge of choosing one or more suitable participants highlighted the advantages and disadvantages of widely used non-probability sampling techniques. Our third challenge examined the question of how many participants will be sufficient for the research to be considered authentic and credible. We noted the variability in participant numbers likely to be considered credible, highlighting this would depend on the research purpose, saliency of data collected and the researcher's epistemological and ontological assumptions. Our fourth challenge, reporting and justifying participant selection, emphasised the need, despite potential space constraints, to report research more clearly and more fully. Interwoven through these four challenges is the need to act ethically and ensuring participants' rights are respected.

More research on understanding and explaining the reporting and justification of participant selection will allow better informed project planning, greater transparency of the research process, and overall, a better level of credibility and authenticity to qualitative research. Qualitative researchers in practice tend to use the expectations of the business and management community: previous experience; expert opinion; and replication of previous studies as justification of their research. We would encourage authors, whatever the basis of their decision-making, to meet our final challenge and report clearly the number of participants chosen, providing a reasoned justification of the decisions made throughout the data collection process.

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