



Guide

Introduction to Qualitative Data Analysis

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1 Introduction

1.1 What is qualitative data?

Qualitative data is information that describes qualities or characteristics rather than quantities or numbers. It typically takes the form of words, images, sounds, or observations. While quantitative data tells you how many or how much, qualitative data tells you about experiences, perspectives, meanings, and contexts.

In research and evaluation, qualitative data helps you understand:

- Why something happened, not just what happened
- How people experience or perceive something
- The context and nuances behind the numbers
- Unexpected findings that surveys might miss
- The story behind your project's impact

1.2 Sources of qualitative data

Qualitative data can come from many sources. The most common in research and evaluation include:

Source	Examples	What it captures
Questions	Interviews, focus groups, open-ended survey questions	People's views, experiences, and perspectives in their own words
Observations	Field notes, event observations, participant observation	What actually happens, behaviours, interactions, context
Documents	Reports, meeting minutes, program records, media	Existing information, historical context, organisational perspectives

Each source has strengths and limitations. Interviews allow depth but take time. Observations capture behaviour but require interpretation. Documents provide context but may not reflect current reality. The best analysis often draws on multiple sources.

1.3 Purpose of this Guide

This guide provides a practical introduction to analysing qualitative data. It is designed for researchers, evaluators, and project staff who need to make sense of qualitative information but may not have extensive research training.

The Guide covers:

- Working with different types of qualitative data
- The process of thematic analysis



- Knowing when you have enough data
- Presenting your findings effectively
- Common mistakes and how to avoid them
- Practical tools including Excel

A note on terminology

You may hear terms like 'coding', 'themes', 'categories', and 'patterns'. Don't be intimidated – these are simply ways of describing the process of sorting and making sense of your data. This guide will explain each term as we go.



2 Working with different data sources

Different types of qualitative data require slightly different approaches. This section provides guidance on working with the most common sources.

2.1 Interview data

Interviews provide rich, in-depth data from individuals. They allow you to explore topics deeply and follow up on interesting points.

Characteristics of interview data:

- Each interview is a single person's perspective
- You can often identify who said what (useful for tracking individual journeys)
- Responses are shaped by the questions asked and the rapport with the interviewer
- Depth is usually prioritised over breadth

Tips for analysing interviews:

- Read each interview as a whole first to understand the person's overall perspective
- Look for what is emphasised, repeated, or said with emotion
- Note contradictions or tensions within a single interview
- Consider how this person's perspective relates to others
- Keep track of which participant said what (using codes like P1, P2) for later reference

2.2 Focus group data

Focus groups capture group discussion and interaction. The dynamic is different from interviews – participants respond to each other, build on ideas, and sometimes disagree.

Characteristics of focus group data:

- Reflects group dynamics, not just individual views
- Shows where there is consensus and disagreement
- Can be harder to attribute specific comments to individuals
- May include some voices more than others (dominant participants)

Tips for analysing focus groups:

- Pay attention to what the group agreed on vs. where views diverged
- Note when participants built on each other's ideas
- Consider whether quieter participants' views were captured
- Look for moments of energy or strong reaction in the group
- If you have chat data from virtual sessions, include this in your analysis



Common mistake: Treating focus group data like interview data

Focus groups capture group perspectives, not individual ones. Be careful about attributing views to 'participants' as if each person was interviewed separately. Instead, frame findings as 'the group discussed...' or 'there was general agreement that...'

2.3 Open-ended survey responses

Open-ended survey questions provide brief qualitative responses from a larger number of people. They are typically shorter and less detailed than interview data.

Characteristics of survey response data:

- Higher volume, lower depth than interviews
- Responses are often brief (one sentence to one paragraph)
- You cannot follow up or ask for clarification
- Useful for identifying patterns across many respondents

Tips for analysing survey responses:

- Read through all responses first to get a sense of the range
- Look for frequently mentioned topics or phrases
- Don't over-interpret brief comments – they may lack context
- Quantify where appropriate (e.g., '15 of 30 respondents mentioned...')
- Use quotes to illustrate themes, but be aware they are often less rich than interview quotes

2.4 Observation notes

Observation data captures what you saw and heard in a particular setting. It provides context that self-reported data may miss.

Characteristics of observation data:

- Captures behaviour and context, not just reported views
- Shaped by what the observer noticed and recorded
- Can include both description and interpretation
- Provides valuable context for other data sources

Tips for analysing observations:

- Separate description from interpretation in your notes
- Look for patterns across multiple observations
- Consider what might have influenced what you observed
- Use observations to triangulate (cross-check) other data



2.5 Documents and records

Documents such as reports, meeting minutes, and program records provide existing qualitative information that can supplement primary data collection.

Tips for analysing documents:

- Consider who created the document and for what purpose
- Be aware that documents represent a particular perspective
- Look for changes over time if you have multiple versions
- Use documents to provide context rather than as primary evidence

2.6 Combining multiple sources

Using multiple data sources strengthens your analysis through triangulation – looking at the same question from different angles.

When combining sources, consider:

- Do different sources tell a consistent story?
- Where sources differ, why might that be?
- What does each source contribute that others don't?
- Are there gaps that none of your sources address?

Triangulation in practice

If interview participants say the training was valuable, and you observed high engagement during sessions, and feedback forms show positive ratings, you have triangulated evidence of impact. If sources tell different stories, explore why – both perspectives may be valid.



3 The Analysis Process

This section walks through the process of thematic analysis – the most used approach for analysing qualitative data in research and evaluation.

3.1 What is thematic analysis?

Thematic analysis is a method for identifying, analysing, and reporting patterns (themes) within your data. A theme captures something important about the data in relation to your questions and represents some level of pattern or meaning.

There are two broad approaches:

- Inductive (bottom-up): You start with the data and let themes emerge from what you find
- Deductive (top-down): You start with specific questions or categories and look for data that fits

In practice, most analysis uses a mix of both – you may have some questions you need to answer (deductive) while remaining open to unexpected findings (inductive).

3.2 Step 1: Familiarise yourself with the data

Before you start coding, you need to know your data well. This means reading (or listening to) everything at least once, ideally twice.

During familiarisation:

- Read actively, not passively – engage with what you're reading
- Make notes about initial impressions and ideas
- Note anything that surprises you or stands out
- Start noticing patterns, but don't lock them in yet
- If you collected the data yourself, reflect on what you remember from the conversations

Time investment

Don't rush familiarisation. It may feel unproductive because you're not 'doing' anything visible, but this stage shapes everything that follows. A good rule of thumb is to spend about 20% of your analysis time on familiarisation.

3.3 Step 2: Generate initial codes

Coding means labelling sections of your data with short descriptive tags. Codes identify features of the data that might be relevant to your questions.

Practical approaches to coding:



- Highlight or underline relevant sections of text
- Write codes in the margin (if working on paper) or in a separate column (if using a spreadsheet)
- Use colour-coding to visually group related codes
- Code everything that might be relevant – you can refine later

Types of codes:

- Descriptive codes: What is being talked about (e.g., 'time constraints', 'staff support')
- Interpretive codes: What it might mean (e.g., 'feeling overwhelmed', 'valuing relationships')
- In vivo codes: Using the participant's own words (e.g., 'juggling everything')

⚠ Common mistake: Creating too many or too few codes

If every sentence has a different code, your codes are too specific and you'll struggle to find patterns. If you only have three codes for an entire transcript, your codes are too broad and you're missing nuance. Aim for codes that capture meaningful chunks – typically a few sentences to a paragraph.

3.4 Step 3: Search for themes

Once you have coded your data, step back and look for patterns. Which codes cluster together? What broader themes do they suggest?

A theme is broader than a code. For example:

Theme	Codes within this theme
Limited resources	'not enough time', 'understaffed', 'budget cuts', 'competing priorities'
Value of peer support	'learning from others', 'shared experiences', 'not feeling alone', 'practical tips from colleagues'
Barriers to engagement	'transport issues', 'childcare responsibilities', 'timing of sessions', 'didn't feel relevant'

To develop themes:

- Group related codes together
- Consider what story the grouped codes tell
- Give each grouping a descriptive name (this becomes your theme)
- Check that each theme is distinct – if two themes overlap heavily, consider combining them
- Aim for 3-7 main themes (more than this becomes hard to manage and communicate)



3.5 Step 4: Review and refine themes

Review your themes to check they work – both in relation to the coded data and the full dataset.

Questions to ask:

- Does each theme have enough data to support it?
- Is each theme coherent (does the data within it fit together)?
- Are themes distinct from each other?
- Do the themes together tell a meaningful story about your data?
- Have you missed anything important?

At this stage you might:

- Merge themes that are too similar
- Split themes that contain too many different ideas
- Discard themes that don't have enough supporting data
- Create new themes for important ideas you initially missed

✓ Peer checking

Ask a colleague to review a sample of your coding to see if they agree with your interpretations.

This doesn't mean you need to agree on everything – discussion about different interpretations often strengthens the analysis.

If you're working alone, step away for a day and review your themes with fresh eyes.

3.6 Step 5: Define and name themes

Once your themes are stable, define what each one means and give it a clear, informative name.

For each theme, be able to articulate:

- What the theme is about (in one or two sentences)
- What makes it distinct from other themes
- What aspect of the data it captures

Good theme names are:

- Descriptive – the reader understands what the theme is about
- Concise – typically 2-6 words
- Informative – they say something, not just label a topic

Weak theme name

Time

Stronger theme name

Never enough time: competing demands on staff



Training	Training builds confidence but gaps remain
Communication	Communication breakdowns undermine collaboration
Positive feedback	Participants value peer connection most

3.7 Step 6: Write up your analysis

The final step is presenting your themes in a clear, compelling way. This is covered in detail in Section 5: Presenting Your Findings.



4 Knowing When You Have Enough Data

A common question in qualitative research is: how do I know when I have collected and analysed enough data? This section addresses the concept of saturation and provides practical guidance.

4.1 What is saturation?

Saturation is the point at which collecting more data no longer generates new insights. You start hearing the same things repeated, and additional interviews or observations confirm what you already know rather than adding new information.

Saturation is the qualitative equivalent of 'enough data'. Unlike quantitative research, where sample size can be calculated statistically, qualitative research relies on judgement about when saturation has been reached.

4.2 Signs you may have reached saturation

- New interviews or observations confirm existing themes but don't add new ones
- You can predict what participants will say based on your existing data
- Your codebook has stabilised – you're not creating new codes
- You have multiple examples of each theme from different sources
- Your themes feel comprehensive and coherent

4.3 Signs you may need more data

- You have themes supported by only one or two examples
- Important perspectives are missing (e.g., you've only heard from service providers, not service users)
- Participants mention experiences you haven't captured
- Your themes feel thin or underdeveloped
- You still have unanswered questions

4.4 Practical considerations

In real-world research and evaluation, decisions about 'enough' data often involve practical constraints as well as methodological considerations.

Factors that influence how much data you need:

- Scope of your questions: Narrow, focused questions require less data than broad, exploratory ones
- Homogeneity of your population: If your participants are similar, you'll reach saturation faster
- Depth of data: Rich, detailed interviews may require fewer participants than brief responses
- Purpose of the research: Academic research often requires more data than practical evaluation
- Resources available: Time, budget, and access to participants all play a role



A practical rule of thumb

For evaluation and applied research, 8-12 interviews will often reach saturation for a focused topic with a relatively homogeneous group. For focus groups, 2-4 groups often suffice. However, these are guidelines, not rules – always assess saturation in relation to your specific data.

4.5 What if you can't collect more data?

Sometimes practical constraints mean you have to work with limited data. In these cases:

- Be honest about limitations in your reporting
- Frame findings appropriately (e.g., 'initial findings suggest...' rather than 'the research shows...')
- Note where additional data would strengthen conclusions
- Focus on what your data can tell you rather than what it can't
- Triangulate with other sources where possible

Don't overclaim from limited data

If you interviewed three people, don't present findings as if they represent everyone. Be precise about what your data can and cannot support. 'Three of the five participants reported...' is more accurate than 'Participants reported...'



5 Presenting Your Findings

Analysis is only useful if it is communicated effectively. This section covers how to present qualitative findings, including the effective use of quotes.

5.1 Tables and counts

Although qualitative data is not primarily about numbers, summarising the frequency of themes can be useful for giving readers an overview.

Theme	Number of respondents
Valued peer support	12
Wanted more follow-up	8
Found timing difficult	6
Suggested different format	4
Other	3

When using counts:

- Be clear about what the numbers represent (respondents, comments, etc.)
- Don't over-interpret small differences (12 vs. 10 is not meaningful in qualitative data)
- Use counts to show relative importance, not statistical significance
- Always supplement counts with qualitative description

5.2 Using quotes effectively

Quotes bring your data to life and provide evidence for your interpretations. But not every piece of data makes a good quote. Selecting the right quotes is an important skill.

5.2.1 What makes something worth quoting?

A quote is worth including if it:

- Illustrates a theme clearly and compellingly
- Says something better than you could paraphrase it
- Captures the authentic voice and experience of participants
- Provides specific, concrete detail
- Is memorable or striking



- Represents a view shared by others (not just one outlier)

A quote is probably not worth including if it:

- Is vague or generic (e.g., 'It was good')
- Requires extensive explanation to make sense
- Simply repeats what you've already said in your own words
- Is so long that readers will lose interest
- Only makes sense with so much context that you might as well paraphrase

5.2.2 Example: Choosing between quotes

Imagine you have three quotes that relate to a theme about training being valuable:

"It was good."

— Workshop participant

Too vague – doesn't add anything beyond the theme statement

"I learned a lot from the training and found it useful for my work."

— Workshop participant

Better, but still fairly generic – could apply to any training

"Before the training, I was second-guessing myself every time I had to have a difficult conversation with a client. Now I have a framework – I actually look forward to those conversations because I know what to do."

— Community worker

Specific, concrete, shows transformation – this is worth quoting

The third quote is worth including because it provides specific detail about change (before/after), captures genuine voice, and illustrates the theme in a memorable way.

5.2.3 Presenting quotes

When including quotes in your report:



- Introduce the quote – explain what it illustrates
- Keep quotes to 1-3 sentences where possible
- Use [...] to indicate where you have removed text
- Attribute quotes appropriately (role, not name, for anonymity)
- Format quotes consistently (typically indented and/or italicised)
- Don't let quotes do all the work – always explain what they show

✓ The 'quote sandwich'

A useful structure is: introduction → quote → interpretation.

For example: 'Several participants described how the program had changed their approach. As one coordinator explained: "[quote]" This illustrates the shift from reactive to proactive practice that emerged as a key theme.'

5.3 Vignettes and case examples

A vignette is a short narrative (typically half a page or less) that illustrates a key finding through a specific example or story. Vignettes provide context that isolated quotes cannot.

A vignette typically includes:

- Context: Who, what, where
- Situation: What was happening or what was the challenge
- Response: What happened or what was done
- Outcome or learning: What resulted or what can be learned

Vignettes are useful when:

- You want to show a process or journey, not just a moment
- Context is essential to understanding the finding
- You have a particularly powerful or illustrative example
- You want to bring data to life for readers

⚠ Ethical considerations with vignettes

Even with names changed, detailed vignettes may identify individuals, especially in small communities or programs. Always check that the person is comfortable with their story being shared in this way, even if anonymised.



5.4 Writing about your findings

When writing up qualitative findings:

- Lead with your interpretation, then provide evidence (quotes, examples)
- Be specific – avoid vague statements like 'many participants felt...'
- Acknowledge complexity and variation – not everyone will agree
- Connect findings back to your questions
- Be honest about limitations

The most important question to ask yourself

When presenting any finding, ask: 'What is the most important or interesting thing about this?' Lead with that, not with every detail.



6 Common Mistakes and Tips

This section summarises common pitfalls in qualitative analysis and provides practical tips for avoiding them.

6.1 Common mistakes

Mistake 1: Starting to code before familiarising yourself with the data

If you start coding immediately, you'll miss the bigger picture and may create codes that don't capture what's most important. Take time to read through everything first.

Mistake 2: Letting quotes speak for themselves

Quotes are evidence, not explanation. Always tell the reader what a quote illustrates and why it matters. Don't assume the meaning is obvious.

Mistake 3: Treating all data as equally important

Not everything participants say is equally significant. Focus on patterns, not one-off comments. One person mentioning something once is not the same as ten people emphasising it repeatedly.

Mistake 4: Forcing data into predetermined categories

If you start with fixed categories and force your data into them, you'll miss what's actually there. Stay open to what emerges, even if it's not what you expected.

Mistake 5: Overclaiming from limited data

Three interviews cannot tell you what 'everyone' thinks. Be precise about what your data can support and frame claims appropriately.



Mistake 6: Ignoring contradictory evidence

If some data doesn't fit your themes, don't ignore it. Contradictions and outliers often contain important insights. Acknowledge complexity.

Mistake 7: Not keeping track of your process

If you can't explain how you got from raw data to findings, your analysis lacks transparency. Keep notes on your decisions and reasoning.

6.2 Tips for good analysis

Tip 1: Keep an audit trail

Document your analysis process as you go. Note which codes you created, merged, or discarded and why.

This makes your analysis transparent and helps if you need to revisit decisions later.

Tip 2: Write memos

As you analyse, write short notes to yourself about patterns you notice, questions that arise, and potential interpretations.

These memos often become the foundation of your findings section.

Tip 3: Look for disconfirming evidence

Actively look for data that contradicts your emerging themes. This strengthens your analysis by ensuring you're not just seeing what you expect to see.



✓ **Tip 4: Talk about your analysis**

Explaining your emerging findings to someone else – even someone unfamiliar with the project – helps clarify your thinking. If you can't explain a theme clearly in conversation, it may need more work.

✓ **Tip 5: Step away and return**

If you're stuck or too close to the data, take a break. Returning with fresh eyes often reveals new insights or problems you hadn't noticed.

✓ **Tip 6: Be willing to change your mind**

Your first interpretation may not be your best. As you go deeper into the data, be prepared to revise your themes and conclusions.



7 Tools for Analysis

7.1 Software options

There are several software packages designed specifically for qualitative data analysis, including NVivo, ATLAS.ti, and MAXQDA. These tools offer features like:

- Systematic coding and retrieval of coded segments
- Visual mapping of themes and relationships
- Team collaboration features
- Integration with other data sources

However, specialised software:

- Can be expensive (hundreds to thousands of dollars)
- Has a learning curve that may not be worth it for small projects
- Is not necessary for most basic qualitative analysis

When to consider specialised software

Specialised QDA software is most valuable when you have large amounts of data, multiple team members coding, or need to manage complex analysis. For most small to medium projects, simpler tools work fine.

7.2 Using Excel for qualitative analysis

Microsoft Excel is a practical, accessible tool for qualitative analysis that most people already have. While it lacks some features of specialised software, it is perfectly adequate for most analysis needs.

Basic setup:

- Column A: Your raw data (one response or segment per row)
- Column B onwards: Your codes/themes (one per column)
- Enter '1' in a cell when a code applies to that row
- Use SUM to count how many times each code appears

Useful Excel features for qualitative analysis:

- Conditional formatting: Colour-code cells based on codes
- Filtering: Show only rows with specific codes
- Comments: Add notes to cells without cluttering the main view
- Multiple sheets: Keep raw data, coding, and theme summaries separate
- COUNTIF: Count occurrences of specific values

For most evaluations and small research projects, Excel combined with Word for writing memos and findings is all you need.



8 Templates and Checklists

8.1 Analysis quality checklist

Use this checklist to review the quality of your qualitative analysis before finalising your findings.

Before you start	✓
I have all data collected and organised	<input type="checkbox"/>
I have read/reviewed all data at least once	<input type="checkbox"/>
I have made initial notes about impressions and patterns	<input type="checkbox"/>
I am clear on the questions I need to answer	<input type="checkbox"/>
During coding	✓
I have coded systematically across all data	<input type="checkbox"/>
My codes are at a consistent level of detail	<input type="checkbox"/>
I have kept notes on coding decisions	<input type="checkbox"/>
I have looked for both expected and unexpected content	<input type="checkbox"/>
Theme development	✓
Each theme has sufficient supporting data	<input type="checkbox"/>
Themes are distinct from each other	<input type="checkbox"/>
Theme names are clear and informative	<input type="checkbox"/>
I have looked for disconfirming evidence	<input type="checkbox"/>
I have considered alternative interpretations	<input type="checkbox"/>



Before finalising	✓
Someone else has reviewed a sample of my coding	<input type="checkbox"/>
My findings address my research/evaluation questions	<input type="checkbox"/>
I have selected illustrative quotes	<input type="checkbox"/>
I have acknowledged limitations	<input type="checkbox"/>
My claims are proportionate to my data	<input type="checkbox"/>

8.2 Quote selection checklist

Before including a quote, check that it meets these criteria:

Is this quote worth including?	✓
It illustrates a theme clearly	<input type="checkbox"/>
It adds something I couldn't say as well in my own words	<input type="checkbox"/>
It is specific and concrete, not vague	<input type="checkbox"/>
It represents a pattern (not just one outlier)	<input type="checkbox"/>
It is an appropriate length (not too long)	<input type="checkbox"/>
It can be understood without excessive explanation	<input type="checkbox"/>
I have introduced what it illustrates and interpreted what it shows	<input type="checkbox"/>

8.3 Theme documentation template

While you are developing your skills in analysis, you can use this template to document the specifics of your approach to each theme.

Theme name	[Clear, descriptive name]
Definition	[1-2 sentence description of what this theme captures]



Related codes	[List the codes that sit within this theme]
Supporting data	[How many participants/sources support this theme?]
Key quotes	[Best illustrative quotes with attribution]
Notes/tensions	[Any contradictions, caveats, or complexities]

You are ready!

This guide has provided an introduction to qualitative data analysis. Like any skill, analysis improves with practice. Start with the basics covered here, and develop your approach as you gain experience.

Remember: good qualitative analysis is not about following rigid rules. It's about engaging thoughtfully with your data, being transparent about your process, and telling the story that the data reveals.

Good luck with your analysis!

