

Introduction to Qualitative Methods: Reflection note from shared learning workshop

Background

This note draws on learning from a capacity-building project in which NatCen worked with several organisations that run programmes aimed at helping young people to enter employment.

This output was created as a reflective note following a workshop, which was part of a suite of learning outputs to support these organisations. This note is intended to provide a starting point for thinking about using qualitative methods within evaluation work. It includes some considerations, hints and tips built up from our experience of carrying out evaluations which include qualitative data collection.

We have provided references at the end for looking at this topic in more depth.

Introducing qualitative methods in evaluations

Qualitative methods are regularly used within evaluations, either in combination with quantitative methods or on their own.

As part of an evaluation, qualitative and quantitative research methods can be complementary, with qualitative methods helping move beyond finding out whether a programme or intervention works, to understanding why, when, and how it works. This exploratory element means qualitative methods can help recognise any unexpected issues, challenges, or ideas, and what needs addressing if the programme or intervention is taken forward.

Qualitative research generally aims to provide in-depth, rich, and detailed understandings and tends to focus on participants' perspectives. This may include understanding:

1. Experiences and knowledge
 2. The meanings people give to experiences
 3. Range and diversity
- Social phenomena e.g. how individuals and/or groups behave, how organisations function, relationships between individuals etc.

Qualitative methods have smaller samples, compared to quantitative methods, and allow for more detail and depth about each participant and/or the intervention. Qualitative research does not intend to tell you 'how many', so does not need a statistically representative sample. Instead, participants are deliberately selected to reflect particular features of, or groups within, the sampled population. A good



qualitative sample will map the range and diversity of the population on key characteristics, in terms of inclusion rather than numbers.

The table below highlights some of the differences between qualitative and quantitative approaches to sampling.

	Sample aims	Sample requirements	Sample type		
Why when	Qualitative	<ul style="list-style-type: none"> In-depth exploration Data in context 	<ul style="list-style-type: none"> Map diversity; include key groups and dimensions Smaller sample size 	Purposive: deliberate selection on basis of known characteristics	and to use
	Quantitative	<ul style="list-style-type: none"> Measures extent Statistical correlations 	<ul style="list-style-type: none"> Statistical representation, exact mirror of population Large sample size; robust estimates 	Random probability	

qualitative methods

Qualitative methods can bring a deep understanding, helping organisations understand the reasons why something has or has not worked. In this way, these methods can also provide the 'story' behind the findings from quantitative data. For instance, organisations may use qualitative methods to understand what their participants enjoyed about the programme, what helped them achieve outcomes and what improvements need to be made to the service. Qualitative methods also allow respondents to reflect, explore their thoughts and ideas and generate solutions for an issue or problem.

In brief, qualitative methods can allow an organisation to:

- understand whether their service delivery is consistent with their programme theory
- find out whether the activities are sufficient to lead to intended outcomes
- learn what hindered or facilitated the impact of a programme
- understand whether and how the programme was received by, or affected, groups differently
- explain and contextualise any quantitative data collected
- inform decisions on what to change or how to improve the programme
- provide evidence about whether the programme can be successful elsewhere, or can be scaled up



Qualitative methods may be used at any stage of programme delivery. For example:

1. **At the beginning of the programme** e.g. to understand their participants' expectations.
2. **During the programme** e.g. to gauge whether participants need additional support, or to understand young people's barriers or enablers to taking part.
3. **At the end of the programme** e.g. to understand what helped participants the most, or to explore why expected outcomes were not achieved.

Within evaluation work, qualitative methods can also be used to help develop or refine Theory of Change (ToC) or Participant Journey maps. For example, qualitative research can be used in the planning stages of an evaluation, by running workshops or focus groups with participants to explore whether diagrams (ToC or Participant Journey maps) accurately reflect the programme.

Skills for qualitative research

Open questions and probing

Open questions are used to gain more depth and allow the participant to take the question in the direction that feels most important to them and avoids one-word answers. As part of this, probes can be used. These are different types of questions that support the research in getting below the surface of the participant's initial answer. These include:

- **Clarification probes** to help check in on unclear terms or meaning, e.g. "what do you mean when you say it was lacking?"
- **Explanatory probes** to find out the reason behind something, e.g. "tell me more about why mentoring wasn't helpful?"
- **Impact probes** to explore the effect/difference/impact of something, e.g. "how much did your sport group peers actually support you?"
- **Scoping probes** to make sure all factors are covered, e.g. "you said your mentor wasn't a good match because they were from a different area. Is there any other reason you thought it wasn't a good match?"
- **Challenging probes** to use when participants say something contradictory, e.g. "you said the sports sessions were unnecessary, but from what you're saying now there are some benefits?".



Active listening

One key skill for qualitative research is active listening; hearing what someone says, needs to be practiced. The next box provides an example exercise to think about or practice before starting interviews/focus groups.

Active listening exercise

Exercise: Pair up with someone and ask them to talk about something (e.g. their weekend) for two minutes with no interruption, questions, or showing a reaction through their body language.

Reflection: Was it difficult not to interject, ask questions or show facial emotions? Could input have changed the trajectory of the answer given? It is important to allow silences and let the participant fully finish their answer.

Interview/focus group flow

Interview/focus group flow should also be considered. It is helpful to structure the discussion so that the interview/focus group starts with the introduction and participant background before moving into the more substantive core themes and topics, then ending the interview/discussion on a positive note.



Interviews vs focus groups

Interviews generate in-depth data through interactions between the participant and researcher. Focus groups generate data mostly through interactions between participants and may be slightly longer than interviews.

When choosing between these methods, it is important to consider:

- The **type of data you** want. If the aim is to understand issues in depth and gain personal accounts, interviews are usually a good choice. Interviews allow time and space to explore complex issues such as motivation and decision making, If you would like to generate ideas/solutions or understand differences between participants, focus groups may be a better choice. It can be easier for people to tackle these topics working as a group rather than alone.



- Subject matter.** Interviews are more appropriate for sensitive research topics. Participants can find it easier to discuss these issues in private, whereas a group setting may inhibit or distort responses. Focus groups may be better for creative thinking and service improvement. For instance, people can find it easier to explain their own view when they hear a different attitude. The interaction between the group can also show what sorts of factors influence people's views and what helps them to change their mind.

In-depth interviews

- Interaction between one participant and a researcher
- Focus on an individual's views and experiences: detailed subject coverage
- If face to face, usually last between 45-60 minutes

Focus groups

- Group interaction
- Participants present their own views and hear from other people
- Face to face, usually last up to 2 hours

Delivery tools

For both methods you should use delivery tools including a topic guide and recording device.

The primary role of the **topic guide** is to have a practical map of topics and themes to be covered in the research, to ensure consistency of coverage whilst also being able to be flexible and responsive. Topic guides will allow the precise question wording to be left to the interviewer, meaning that they can tailor it to what the participant is discussing. As such, the interview is participant-led and more flexible than one based on a pre-specified list of questions (such as a questionnaire or survey).

In practice, a topic guide is a list of key themes and topics to cover which pertain to the research questions. These themes are often divided into sub-themes, with prompts included for each, which help if participants need some guidance or are not elaborating on their own.

See below for an example excerpt of a topic guide:



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Engaging adults in youth volunteering Topic guide for non-volunteers

We wish to encourage participants to discuss their views, perception and attitudes in an open way without excluding issues which may be of importance to the study. Therefore the questioning will be responsive to the issues raised in the course of the interview.

The following guide lists the key themes, sub-themes and questions to be explored at each interview. It does not include many follow-up questions like 'why', 'when', 'how', as it is assumed that participant's contributions will be fully explored throughout in order to understand how and why views are held.

Discretion should be used regarding coverage of questioning. Some participants may have limited knowledge of some topic areas and some areas may not be relevant to all interviews.

Text in italics denotes instructions to interviewer.

Aims of the interview

Group discussion will focus on:

- Views about volunteering work in general and with young people in particular
- Reasons for not volunteering
- Views on the key barriers to volunteering with young people faced by adults (including practical and attitudinal barriers)
- Key facilitators that help adults volunteer with young people
- What can be done to encourage volunteering work with young people

3. Views and motivations around volunteering

Aim: to explore views on volunteering work with young people and their reasons for not volunteering

Sub-themes

- Explore views on the **key issues** currently facing different types of young people – what is it like to be a young person today?
 - Emotional
 - Social
 - Work-related
 - Educational
 - Community issues
- Explore views around whether (and which) young people need **any support** to deal with these issues
(NB: Could use flipchart here to map the support needed for each of the above issues)
 - What kind of support do they need?
- Explore views around **where this support** should come from
 - Family
 - Government
 - Educational system
- Explore views on the **role of volunteering** in providing this support
 - Do they see the adults volunteering to be important in providing support?
 - If not, why not?
 - If so, why?
- Explore their main motivations for wanting to do **volunteering** work with young people
 - Career related reasons (e.g. needing experience to work in a particular profession)
 - They were compelled to (e.g. bored, as condition of any benefits they are claiming)
 - Their own experiences of an issue or those of friends and family (e.g. illness)
 - Wanting to do good/give back
 - Why have they considered volunteer/work in the youth sector in particular?
 - What makes it different to volunteering that they might do in other sectors?

Section aim

Prompts



When developing a topic guide and undertaking an interview or focus group, it is important to consider the circumstances and needs of the group you are working with, to ensure the encounter is inclusive and accessible for all participants. For example, when interviewing young people, it is essential to make sure that language and terminology are age-appropriate and additional help is provided if needed. It is helpful to think about your participant group as a whole (such as 'young people') as well as any differences within the target group. Steps can be taken to make the research more inclusive and accessible, such as allowing enough time to introduce the research, explaining any complex concepts, or offering the option of having a friend/relative/parent present during the interview for support.

Audio recording devices are another useful tool when conducting qualitative interviews and focus groups. Audio recording interviews ensures the interview is captured accurately and means the interviewer can focus on what the participant is saying without worrying about having to take notes.

Data	Topic guide	Recording interaction
	<ul style="list-style-type: none"> • Aide memoire - to navigate interaction • Lists topics, themes and prompts • Flexibility – responsive structure and question formulation • Consistency – of coverage 	<ul style="list-style-type: none"> • Audio recording interviews • Helps active listening • Accurate capture of interaction and language

management and analysis

The next stage in the process involves managing and analysing qualitative data. There are many possible approaches to qualitative analysis, which typically involve stages where the data are summarised and organised conceptually or thematically.

At NatCen, we regularly use the Framework approach, a systematic approach to qualitative data management, developed by NatCen, to chart (collate and summarise) transcribed data by theme and case (Ritchie *et al.*, 2013). Using the themes covered in topic guides and new emerging themes, we assemble a matrix in which each row represents an individual interview or focus group, and each column a theme and any related sub-themes. We summarise the interview data in the matrix, including illustrative verbatim quotes where appropriate. Once all interviews or groups are coded in the matrix, we analyse the data. This involves a phase of 'detection', which includes studying the elements participants say about a given topic, listing these and then sorting them thematically.

Analysis was not covered in the workshop; more information on this can be found in the documents suggested for further reading.

Please refer to our note on ['Preparing for Evaluation'](#) for more ideas on how to prepare for and get the most out of an evaluation.

Useful sources for further reading

- Ritchie, J., Lewis, J., McNaughton Nicholls, C., and Ormston, R. eds. (2014). *Qualitative Research Practice*. London, England: Sage.
- Spencer, L. Ritchie, J. Lewis, J and Dillon L. (2003) *Quality in Qualitative Evaluation: A framework for assessing research evidence*, Government Chief Social Researcher's Office. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/498321/Quality-in-qualitative-evaluation_tcm6-38739.pdf
- Also see re-publication for a shorter summary: Spencer, L. Ritchie, J. Lewis, J and Dillon L. (2012) *Quality in Qualitative Evaluation: A framework for assessing research evidence (supplementary Megena Book Guidance)*, HM Treasury. Available at: https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/190986/Magenta_Book_quality_in_qualitative_evaluation_QQE.pdf
- McLeod, R. and Noble, J. (2016) *Listen and Learn: How charities can use qualitative research*, NPC. Available at: https://www.thinknpc.org/wp-content/uploads/2018/07/Listen-and-learn_Qualitative-research_Final1.pdf
- Breckon, J. and Puttick, R. (2021) *Quality in Qual: A proposed framework to commission, judge and generate good qualitative evaluation in wellbeing*, What Works Wellbeing. Available at: <https://whatworkswellbeing.org/wp-content/uploads/2021/08/Quality-in-Qual-paper.pdf>