Qualitative methodology and discussion guide

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healthwatch

Contents

Contents... 1

About this guide 2

What is qualitative research, and when to use it? 2

Qualitative research designs 3

Developing a discussion guide 4

Things to consider when carrying out interviews and group discussions 6

Sample discussion guides 7

About this guide

Interviews and focus group discussions are the most common qualitative research methods used at Healthwatch to understand how people experience health and social care services. A discussion guide helps us steer conversations with our research participants during such sessions. It allows us to get the most valuable information within a limited time.

This guide will help you recognise when to use qualitative research and how to develop a discussion guide. It also includes things you should consider during the discussions. There is an example of an interview guide and a focus group discussion guide at the end.

What is qualitative research, and when to use it?

Qualitative research is a method of understanding aspects of people's experience that generates words, rather than numbers, as data for analysis. It does not provide a precise measure of something (e.g., what proportion of people in a community are waiting for elective care) but instead aims to answer the 'what', 'how' or 'why' of an issue (e.g., how has waiting for elective care affected people's life).

You can use qualitative methods in the following situations:

- When carrying out a mixed methods study, you can use qualitative and quantitative methods together to generate 'mixed' data. This data type can be very compelling, especially when influencing policy outcomes, as it combines statistics with softer thematic views and experiences. You can therefore be more confident about your findings.
- It is good to start with qualitative methods when little is known. It will help you generate hypotheses, which you can test using quantitative methods.
- Qualitative methods can also be used when you are interested in only exploring attitudes in depth or when you are working with a small defined group.

Examples where qualitative research could help:

- **To establish people's experiences:** Your local NHS commissioners have distributed blood pressure monitoring machines to all over 60s diagnosed with hypertension. However, it appears that many are not using them. You can interview some of these individuals to find out the reasons for this, such as their ability to use the machines or how busy they are with other life priorities that may impact the usage pattern.

- **To understand different perspectives:** You want to know how remote GP appointments work for patients. You also want to know what practice staff think about it. You can organise semi-structured interviews and focus group discussions with the two groups to get their views and present a balanced perspective to your stakeholders.
- **To understand how attitudes affect behaviours:** Few women from ethnic minority communities have attended a new service of voluntary testing and counselling for HIV in your local hospital. You can undertake in-depth interviews with some women to help understand the barriers to use.

Qualitative research designs

Is a qualitative approach needed?

Once you have established your research question, ask yourself if you want to:

- understand the perspectives of your participants; or
- explore how they impact something; or
- observe a process in depth.

If the answer is yes, then you can use qualitative methodology.

Different methods of collecting qualitative data

Typically, the qualitative methodology includes interviews and group discussions, for which you will need a discussion guide. Hence, this guidance focuses on these two methods. However, at Healthwatch, you can also use surveys and observations to generate qualitative data.

Interviews are like everyday conversations but are focused on your research needs. You should conduct them in such a way that it generates valid and reliable data. In practical terms, it means that you need an interview guide, which someone else can use to generate similar information on the topic.

There should be minimal bias when asking questions and noting your respondent's answers. Read our guidance on how to avoid bias in research methods.

Research interviews can be of three types: structured, unstructured and semi-structured. While structured interviews have a rigid list of questions with no flexibility to add follow-up questions, unstructured interviews lack predetermined questions and can be challenging to manage.

Semi-structured interviews consist of several key questions defining the area you wish to explore but also allowing you and the participant to pursue a response in more detail. Such interviews contain open-ended questions which define the topic of research. This is the most used interview method in Healthwatch research.

Group interviews are discussions with a group of people. They can be informal, where you will have spontaneous chats with groups of people, such as during an engagement event, or in a more formal environment where you will organise a time and a place on purpose.

Informal group interviews can help you scope people's views during project planning or when evaluating a programme. It also helps to understand cultures, habits, and differences between groups.

Formal group interviews, often termed focus groups, are used to explore service users' views or when testing health information materials. This is the most used group interview method in Healthwatch research.

Remember, while interviews will provide an in-depth understanding of an individual's point of view, group discussions will enable you to understand how people interact with each other. It will tell you more about the social structure of your community and how people form opinions in social contexts.

Deliberative events, often used by Healthwatch, involves the public in decision-making. While it is like holding focus groups, it also allows the participants to find out more about your research topic, consider the evidence, and discuss it with other participants before presenting their views. Such events can happen over several weeks.

To find out more about focus groups and deliberative events, see these guides published by Citizens Advice and the National Co-ordinating Centre for Public Engagement on **running focus groups** and **facilitating deliberative engagements**, respectively.

Observations are also another method of generating qualitative data. Many local Healthwatch use this method when carrying out Enter and View visits to health and social care services or undertaking mystery shopping exercises. You can use observational data to check the differences between what people say and do. It might help you uncover behaviours that even the participants may not know. For example, when visiting a busy A&E department, you might notice that due to conflicting demands and pressures on staff, they treat some patients differently from others.

Developing a discussion guide

A discussion guide is an important document that outlines the questions you will ask your research participant(s). Therefore, it is essential to spend some time developing one to help steer the conversation.

When developing a discussion guide, firstly, think about the following:

- What do you want to learn from your research participants?
- What are you going to do with the insight you will gather?

- How will you use this information to influence your stakeholders?

Once you are clear about your aims and purposes, start developing your interview guide.

Step one - Structure your guide into key sections.

Doing this will help you focus and check that you have covered everything you set out in your research goals. You can use the following structure:

- An introduction and a context to your research.
- General questions about the topic.
- Specific questions to take a deep dive into people's views and experiences.
- A concluding section to capture anything that you may have missed during the discussion.

Step two – Think about how you will start the session.

Have a question as a 'discussion starter', i.e., a question that will present the primary topic you want to explore and open the floor to the participant(s) to respond. For example, you can ask them to introduce themselves and say one thing about their experiences of the topic, such as the last time they used a service or how long they have experienced something.

Step three – Develop the questions.

Here are some things to remember:

- It's helpful to work with people who are 'Experts by Experience', i.e., who are affected by your research topic when developing the questions. This will help you ensure that they are appropriate, cover everything relevant and won't be misinterpreted.
- Keep them simple, and do not ask more than one question at a time.
- Think about the logical flow of the interview and the questions you should cover first. Put general questions before specific ones.
- They should address all the major areas you want to explore and tap into your participants' experiences and expertise.
- Ask open-ended questions to elicit a detailed response from your participants. Never ask a question your respondents can answer with one word, such as a yes or a no.
- Adjust the way you frame your questions depending on your respondents. For example, children, professionals, people with limited English, etc. Make sure you have considered their accessibility needs, for example, any sensory impairments.
- Think carefully about how you would draft difficult or potentially embarrassing questions; however, don't hesitate to ask them. You can ask them when you have established a rapport towards the end of the session. For further information on these topics, refer to our guidance on bias and research ethics.

- Don't ask questions where you ask respondents to give you an opinion on behalf of others. Ask them about their own point of view.

Step four – Think about how you will end the session.

The last question should help you close the interview but leave your respondents feeling empowered and listened to. This is good practice and will help you establish a relationship with your participants. You might want to talk to them again in the future to check if your findings reflect what they said during the discussion.

Remember, the discussion guide is precisely that, a guide. It should only help you keep track of where you are in the interview, allowing your respondents to bring up new information freely. You should never use it like a rigid questionnaire, as that defeats the purpose!

Things to consider when carrying out interviews and group discussions

- Think about your research setting and participant privacy - it should help them feel comfortable giving honest answers. You must also inform them how you'll use their data and the lawful basis for doing so. Download our information sheet template for research and engagement.
- Make sure the times and locations are suitable for participants.
- Building a rapport with your research participants is very important. Consider your appearance, tone of voice and body language.
- During virtual interactions, keeping your video on is preferable to make it feel more personal. Also, when interviewing from home, plan as much as possible to avoid distractions for yourself and your interviewees.
- If you are running a focus group in person, prepare resources necessary to undertake good and interactive activities that generate discussions, such as flipcharts, pens, and post-it notes. Use visual aids, such as booklets or slides, to keep participants on track.
- Choose your facilitators well and ensure they are well-briefed so they can support the participants during the discussion.
- Select your participants so you can get a good overall picture of your research topic. You can screen them beforehand using a basic questionnaire to get an idea about their experiences and views. You can also refer to our research sampling guidance.

- A typical session lasts about an hour and a half. Take appropriate breaks if necessary or if you think the session will last longer.
- Remember, a research interview is not an interrogation: you want to hear your respondent's story on their own terms. Prepare possible probing questions when they say something unclear or inconsistent. For example,
    - "Would you explain that further?"
    - "Could you give me an example?"
    - "I don't understand. What do you mean when you say…?"
- When moderating a focus group discussion, you must ensure every participant gets an equal opportunity to express themselves. If possible, it's better to have two moderators so that one can focus on managing the discussion and the other can take notes.
- Do not jump from one topic to another too quickly or abruptly. One subject should logically lead to the next one.

Sample discussion guides

Scenario one - You are interviewing a participant to learn about their experiences with remote GP appointments. You are aware that they have limited knowledge of technology but have access to a smartphone. Here are some questions you can ask:

- Generally speaking, what is it like to see your GP?
- How has the pandemic affected how you see your GP?
- How has the shift to telephone appointments impacted your ability to see a GP?
- How has the change to remote appointments affected your desire to see a GP?
- How do you feel about the quality of care you receive from your GP over the telephone?
- Are there any other issues you experience when having a telephone consultation with your GP?
- Would you prefer remote or in-person appointments, if you were able to choose? Why?
- How do you feel about using apps on your phone to access GP services?
- What would make it easier for you to use the apps on your phone to access GP services?
- Do you have anything else to say about your experience of seeing your GP?

Scenario two - You are undertaking a focus group discussion with a group of people who use British Sign Language (BSL) to communicate. You want to explore their experience of communication with your local hospital. A BSL interpreter accompanies you to help you with the discussion. Here is a sample script you can follow:

- "Good morning, and welcome to our session. My name is… Thanks for taking the time to join us to talk about…" [Welcome and introductions followed by the purpose of the focus group discussion].
- "Before we start, here are some housekeeping reminders…" [Provide the ground rules].
- "You were invited to this discussion because…" [Why the participants were chosen for this discussion].
- "Remember, there are no right and wrong answers. Please feel free to share your views even if it differs from what other have said." [Set the tone of the discussion].
- "We assure you of complete confidentiality…" [Remind them that you will not identify anyone in your report. The findings will only be used for research purposes].
- "Let's start with going around the group. Tell us a bit about yourself and what do you think about…" [Start the discussion by asking your participants to introduce themselves and share their views about the topic you want to explore].

This will open the floor for the discussion, and you can pick on themes/topics to explore further. For example:

- How they feel about the current support.
- What access they have to information.
- Their past experiences - both the positives and negatives.
- What changes they'd like to see in support of BSL users at the hospital/

You can use different techniques to get participants involved, such as by asking them note down their experiences on post-it notes, using rating scales to rate different support options, drawings of good practice, etc.

End your discussion with an ending question: "Of all things we discussed today, what was most important to you?"

Briefly summarise what you gathered from the discussion, and ask for any final comments.

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