Qualitative Insight Toolkit
Section 2 of 5:

GATHERING QUALITATIVE INSIGHT

This is the second of five sections of the Qualitative Insight Toolkit. This section provides an overview of best practice in gathering qualitative insight. It covers the practicalities of recruitment, choosing methods, capturing insights, asking questions, and covers consent and anonymity. This guidance will support you to think like a researcher so you can gather quality insights. Depending on your goals, you may not need to consider all the stages in this toolkit section.

Section 2: Gathering Qualitative Insight

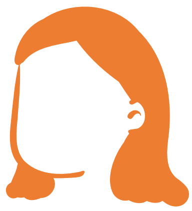
This section provides an overview of best practice in gathering qualitative insight. It covers the practicalities of recruitment, choosing methods, capturing insights, asking questions, and consent and anonymity. This guidance will support you to think as a researcher so you can gather quality insights. Depending on your goals, you may not need to consider all the stages below.

Recruitment

Recruitment is about finding potential people to talk to. You may already know people who'll be willing to talk, but you might want to reach people who aren't likely to volunteer. Recruitment options could include:

- Asking the people who use your services if they'd like to share their views
- Seeking the help of local organisations who support your target audience
- Attending events where your target audience will be
- Advertising via posters, emails, or social media in places your target audience access

Recruitment doesn't have to be completed before you start talking to people. You can ask participants if they know other suitable people and snowball from there.



Sampling

Sampling means selecting a group of participants who'll be able to share a range of experiences on your topic. This contrasts with speaking to people who all share the same experience because of their similar characteristics or lifestyles. Ways you could diversify your sample include:

- Speaking to people who live in different geographical areas
- If reviewing activities or services, consider people who access on different days/times, or those who don't access them at all
- If you have a list of potential participants, randomly select participants to reduce bias

Making your work accessible

Some people may need support to take part because of their physical or mental health, care responsibilities, the cost of travel, accessibility issues, etc. Having a conversation with your participant beforehand is key to understanding how you can adapt to their needs. Examples include:

- Meeting people where and when they feel comfortable
- Ensuring suitable access to buildings, rooms, and toilets
- Adapting the format and language of your recruitment materials
- Subsidising travel costs

Incentives

Incentives can be used to encourage participation, especially for those who are typically underrepresented. Incentives can be monetary (for example, vouchers) or in-kind (for example, food, volunteering opportunities, learning courses, or facilities). For information on ethical considerations around incentives, see the UK Statistics Authority[1], or see NHS England[2] for more guidance on engaging with 'underrepresented groups' in health research.

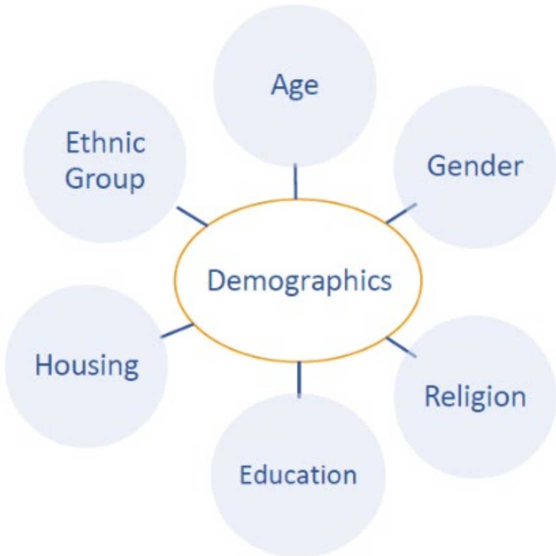
Recruitment resources

When creating recruitment resources, consider what information you'll share, such as the purpose of your work, eligibility criteria, what's involved, dates/time/location, anonymity, benefits of taking part, and what you'll do with their information.

Collecting participant demographics

You might want to collect participant demographics to know the characteristics of the people you're engaging with. It can help you to diversify your sample or compare different people's experiences. However, be careful not to generalise.

It's good practice to only capture relevant demographics. For example, if you're asking people about how they access sexual health services you might want to know their sexual orientation rather than their housing situation.



For more information about demographic questions and answers, including examples and links to resources, see Appendix 2 in the '*Toolkit Appendices*' document on: **https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/**

[1] https://uksa.statisticsauthority.gov.uk/publication/ethical-considerations-associated-with-qualitative-research-methods/pages/5/#lg_reimbursements-and-incentives

[2] https://www.england.nhs.uk/aac/wp-content/uploads/sites/50/2023/02/B1905-increasing-diversity-in-research-participation-v2.pdf.pdf

Choosing your methods

The method(s) you choose will depend on the insights you want to gather, who you'll be speaking to, and the outputs you want to create. It helps to work backwards, thinking of what your end goals are. The table below shows the methods QIT like to use and why. It also offers suggestions for resources and outputs.

Method	Casual conversations	Semi structured depth conversations	Friendship depth conversations	Focus group	Observation
Description	Get to know someone to give you a flavour of their views or experiences. The key is having the confidence to introduce yourself.	A one-to-one conversation. Prepare questions to guide the conversation but have the freedom to follow the respondent's story.	Speak to 2 or 3 people together. Usually works best if the participants are trusted friends or family.	A group conversation guided by you (4 to 8 participants works well). You may incorporate activities like brainstorming.	Observe people's interactions, body language, speech, possessions, etc. Observe from afar, or while taking part in the group or activity.
Pros	• Can be done anywhere • Light touch	• Build report • Capture people's stories in detail and in their own words • Give people time to open up	• Ease discomfort • Explore similarities and differences • Empower your participants	• Capture diverse perspectives • Easy to replicate	• Get an insider's perspective • See what people do, not just what they say they do
Cons	• Limited detail	• Time consuming	• Quality depends on the dynamic between participants	• Some voices may overpower others • Hard to get honesty on sensitive topics	• Difficulties accessing communities/events • Relies on your interpretation
Resources	• Notepad • Post-it notes • Insight grid	• Topic guide • Audio recorder • Notepad	• Topic guide • Audio recorder • Notepad	• Schedule • Audio/video recorder • Flipchart paper • Post-it notes • Refreshments	• Use your senses • A journal
Example Outputs	• Quotes	• Case studies • Journey map	• Case studies	• Visuals (brainstorm, post-it wall, etc.) • Word cloud • Report	• Notes and doodles • Provide context to reporting

Insight capture tools

Capturing the insights you are gathering is important, so that you can draw out themes and present your insights later on. Relying on your memory is risky, so consider using the tools below. For transparency, let people know how you're recording their information and get their consent where needed (see page 9).

Notepad and pen

- Always handy for writing key quotes, observations, and prompts.
- However, using a notebook to transcribe word for word will distract your attention.

Post-it notes*

- Concise.
- Easy to rearrange.
- Show your respondent you've picked up on the key points.
- Good for mapping processes or journeys.

Audio or video recording

- An accurate account of what people said.
- Observe body language and group dynamics.
- Consider that recording can be off putting, and that consent is needed.

*See Anatomy of a Good Sticky Note[3] for more advice on using post-it notes.

Insight grids

Insight grids can help you organise your notes in line with your questions or themes, giving you a head start when it comes to bringing your findings together. They help towards achieving consistency when capturing insights.

The idea is to set out the information you want to collect and leave blank space for your notes. You could include engagement details (time, place, date), participant demographics, and your questions/themes and prompts.

The benefit of insight grids is that the depth of conversation can be flexible. You can also make the grids anonymous to encourage open and honest conversation.

See Appendix 3 for examples of how you can structure your insight grids. This includes blank templates and examples of insight grids being used in practice.

TOP TIPS

At the end of a focus group, try handing out blank paper for people to write anonymous comments. This works well to engage the quieter ones in the group, or for sensitive topics.

[3] https://userresearch.blog.gov.uk/2014/10/29/anatomy-of-a-good-sticky-note/

Also consider creative tools which get your participants involved in capturing their experiences, thoughts, and feelings. See suggestions below or visit New Philanthropy Capital[4] for more creative methods.

Activity sheets

Activity sheets can be designed in advance to help facilitate your conversations. They provide prompts for discussion and can help break down a conversation into manageable parts. Having an activity and visuals to work through together can help put people at ease. Activity sheets are a useful way of collecting insights consistently, making it easier to compare your insights later on.

To see examples of activity sheets that you can use to gather qualitative insight or adapt to suit your needs, see Appendix 4 in the '*Toolkit Appendices'* document on: https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/

Brainstorming

- Interactive
- Gather different perspectives
- Creates a visual of the conversation

Graffiti walls

- A blank canvas for feedback
- Provides some anonymity

Drawing

- Encourage self-expression
- Make engagements and outputs interesting

Photographs

- A window into someone's life
- Elicit emotions and memories

Remember that you don't have to be working on a project to capture insights. Think about ways you could build insight gathering into your day-to-day work. For example, you could create **a template for positive client quotes**, or a **shared folder for stand-out stories** you could use for case studies.

[4] https://www.thinknpc.org/resource-hub/the-cycle-of-good-impact-practice-creative-methods/

The art of asking questions

The way you phrase a question shapes the response you get. Other factors like your body language, attention, and empathy can determine how comfortable participants feel sharing their experiences with you.

Below, the QIT has put together advice for making the most out of your conversations, as well as guidance on open, closed, and leading questions.

- Get to know your participants first.
- Be open minded and curious.
- Listen carefully and look interested.
- Give people time to think and respond. You don't always need to fill the silence.
- Be prepared to adapt your questions based on what you're hearing.
- Pay attention to non-verbal cues like posture, gestures, eye contact, and facial expressions. These can say more than words.
- Try to be relatable – e.g., consider the clothes you wear and the language you use.
- Avoid leading questions.

Open and closed questions

Open-ended questions are designed to get people talking about their experiences and feelings in detail. They often start with "How?", "What?", "Tell me…". On the other hand, closed questions require short answers, like yes/no, agree/disagree, or a number.

Below are examples of how closed questions can be turned into open questions:

Closed Questions

- Do you like your town?
- How many times have you had counselling?
- Would you use our service again?

Open Questions

- What's it like living in your town?
- Can you tell me about any counselling you've had?
- What would make you consider using our service again?

Although closed questions don't get detailed answers, they do have a place in conversations. They can be used:

1. Early on in the conversation **to get people used to being asked questions**:

"How did you get here today?"

"By bus"

"Was it busy?"

"Yeah, I had to stand"

"Have you been to this café before?"

"No, have you?"

"No, but I love these chairs!"

"Me too, I've got some at home"

"Nice! Where do you live?"…

2. To **probe or to clarify** previous responses:
   - "How old were you when that happened?"
   - "Have you always felt that way?"

3. To **paraphrase** (echo back) what the participant has said to confirm your understanding:
   - "Did I understand you when you said…"
   - "Did I hear you say that…"

When used together, open and closed questions create a natural flowing conversation where you can explore people's views and focus in on the relevant details.

Leading questions

Make sure you're not leading people to answer a certain way. You could be doing this by:

- Implying there's a correct answer
- Pressing your opinions on people
- Assuming how people act, think or feel and the reasons why

Avoid using leading questions when starting a discussion so that you open up the floor for a range of possible answers. See below for examples of turning leading questions into open questions:

Leading Questions

- Are you planning to breastfeed?
- Hasn't the town centre gone downhill?
- Do you smoke to cope with your grief?

Open Questions

- What are your plans for feeding your baby?
- What do you think about the town center?
- Why do you smoke?

For more tips on avoiding bias in question design, see Healthwatch's guide[5].

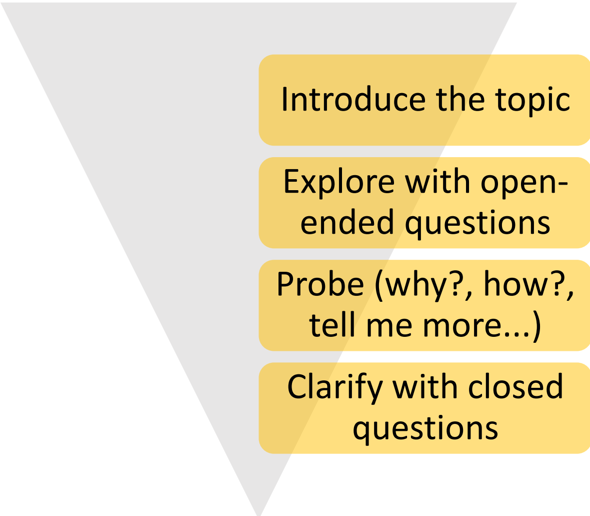
The key takeaway is to be thoughtful when phrasing your questions. Try to listen out for yourself asking leading or closed questions. Asking open ended questions takes practice!

[5] https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/20191101_Managing%20Bias%20Resource%20guidance%20formatted_0.pdf

Preparing your questions

Topic guide

You may find it helpful to plan a topic guide in advance of your engagement. A topic guide outlines the key topics and questions you want to discuss, helping to keep the conversation aligned to your goals. The level of detail included is up to you. If you are new to asking questions, you might be more comfortable holding a structured guide with main questions and prompts. Consider using a **funnel approach** when structuring your conversations:



For a focus group topic guide, you could include timings and the resources you need, for example:

Timing	Topic	Prompts	Resources
15 mins	Objectives	• Explore the group's experiences of attending Eurovision as people who use wheelchairs.	Information sheet
	Ground rules and consent	• Mutual respect • Audio recording	Consent form
	Introductions	• Ice breaker	Name labels
15 mins	Accessibility: enablers and barriers	• How was your experience of attending Eurovision? ○ Transport, seating, toilets…	Flip Chart Pens
10 mins- Break			
15 mins	Ideas brainstorm	• What could make Eurovision more accessible in the future?	Flip Chart Pens

Signposting to support

The questions you ask may prompt conversations where you will need to signpost or refer people to support opportunities. It's a good idea to prepare relevant signposting in advance, in case these situations occur. Great resources for signposting are Wirral InfoBank and Family Toolbox[6]. These are directories of services, community groups, and activities in Wirral that support health and wellbeing. The Family Toolbox provides signposting specific to families.

Consent and anonymity

Informed consent

If you need to capture conversations in more formal ways, such as audio and video recording, whereby participant's personal details are shared with you and stored by you, you should consider gaining their informed consent. Consent may not be required if you're capturing anonymous feedback.

Informed consent is about making your participants fully aware of what it means to take part. They can then decide based on their understanding. You can ask for their consent to gather, process, report and store the information they've provided. You can also confirm the level of anonymity being offered (see Anonymity below).

When asking for consent, it's good practice to get written consent. The QIT has designed a consent form template with suggested questions and space to add your own. Additional guidance is also provided to support you to use consent forms in your work, where appropriate. See Appendix 5 for our consent form template and Appendix 6 for our consent form guidance in the '*Toolkit Appendices'* document on:
https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/

The QIT recommend that consent forms are signed at the end of the engagement. This way, your participants know what their contribution has been before signing.

For frequently asked questions about consent, see UK Research and Innovation[7].

[6] https://www.wirralinfobank.co.uk and https://familytoolbox.co.uk/

[7] https://www.ukri.org/councils/esrc/guidance-for-applicants/research-ethics-guidance/consent/

Anonymity

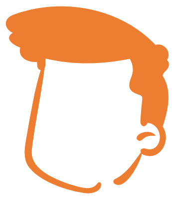
Anonymisation aims to reduce the chances of your participants being recognised by removing or replacing personal identifiers like names, addresses, and other context-specific information. See below for examples of how you could anonymise information:

- Replace names with pseudonyms (fake name) or ID numbers
- Generalise organisation names, e.g., 'a local hospital.'
- Remove specifics about physical appearance
- Use less precise locations, e.g., East Wirral
- Blur people's faces in photographs
- Use age brackets instead of specific ages

It's good practice to anonymise your insights as soon as possible after gathering. If personal identifiers do need to be stored, they should be stored securely[8], in a separate place to your insights.

Please note, if you don't have relevant structures in place to protect personal information then don't collect it. See the Information Commissioner's Office[9] for General Data Protection Regulation (GDPR) guidance for organisations.

Choose an appropriate pseudonym by considering the age, culture, religion, etc., of your participant, or empower them to choose their own pseudonym.



[8] https://ukdataservice.ac.uk/learning-hub/research-data-management/ (see 'Storing Data')

[9] https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/

Looking for more information on the Qualitative Insight Toolkit?

This guidance is the second of five toolkit sections in the Qualitative Insight Toolkit. The five sections of the toolkit are:

1. Planning Your Approach
2. Gathering Your Insight
3. Bringing Your Insight Together
4. Presenting and Sharing Your Insight
5. Reflecting on Your Work

To access the full toolkit guidance, toolkit templates that you can print and use, or guidance and templates for the specific sections above, see:

https://www.wirralintelligenceservice.org/local-voice/qualitative-insight-toolkit/

Contact

If you have questions or feedback about this resource, email the Qualitative Insight Team at qualitativeinsightteam@wirral.gov.uk.

About us

Qualitative Insight is a type of research that speaks to people to gather their thoughts, experiences, and ideas on particular subjects. The Qualitative Insight Team at Wirral Council work with residents to ensure that their voices are heard when informing council policy and decision making. The team supports the delivery of the Health and Wellbeing strategy, in which residents' voices are a key strand.

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