

## GATHERING QUALITATIVE INSIGHT

This is the second of five sections of the Qualitative Insight Toolkit.

Qualitative insight is information gathered from people that describes their experiences, opinions, and motivations. This insight can be used to help us understand people's behaviour and influence decision making to better suit the needs of people and communities.

This section provides an overview of best practice in gathering qualitative insight.

## Section 2: Gathering Qualitative Insight

This section provides an overview of best practice in gathering qualitative insight. It covers the practicalities of recruitment, choosing how you will collect data – your methods, capturing qualitative insights itself, asking questions, and gathering participant consent. 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 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](https://uksa.statisticsauthority.gov.uk/publication/ethical-considerations-associated-with-qualitative-research-methods/pages/5/#lg_reimbursements-and-incentives)<sup>1</sup>, or see [NHS England](https://www.england.nhs.uk/aac/wp-content/uploads/sites/50/2023/02/B1905-increasing-diversity-in-research-participation-v2.pdf.pdf)<sup>2</sup> for more guidance on engaging with ‘underrepresented groups’ in health research.

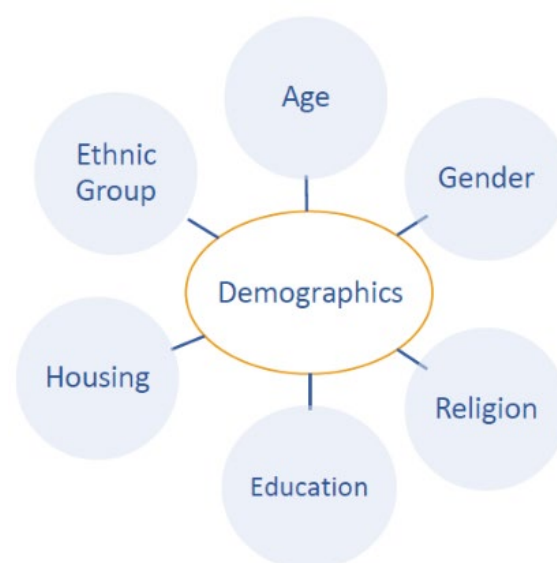
## Recruitment resources

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, confidentiality, 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 our ‘*Section 2 Templates: Gathering Qualitative Insight*’ document here:

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

<sup>1</sup> [https://uksa.statisticsauthority.gov.uk/publication/ethical-considerations-associated-with-qualitative-research-methods/pages/5/#lg\\_reimbursements-and-incentives](https://uksa.statisticsauthority.gov.uk/publication/ethical-considerations-associated-with-qualitative-research-methods/pages/5/#lg_reimbursements-and-incentives)

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

## Choosing how to collect insights: 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 the Qualitative Insight Team 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	<ul style="list-style-type: none"> <li>• Can be done anywhere</li> <li>• Light touch</li> </ul>	<ul style="list-style-type: none"> <li>• Build report</li> <li>• Capture people's stories in detail and in their own words</li> <li>• Give people time to open up</li> </ul>	<ul style="list-style-type: none"> <li>• Ease discomfort</li> <li>• Explore similarities and differences</li> <li>• Empower your participants</li> </ul>	<ul style="list-style-type: none"> <li>• Capture diverse perspectives</li> <li>• Easy to replicate</li> </ul>	<ul style="list-style-type: none"> <li>• Get an insider's perspective</li> <li>• See what people do, not just what they say they do</li> </ul>
Cons	<ul style="list-style-type: none"> <li>• Limited detail</li> </ul>	<ul style="list-style-type: none"> <li>• Time consuming</li> </ul>	<ul style="list-style-type: none"> <li>• Quality depends on the dynamic between participants</li> </ul>	<ul style="list-style-type: none"> <li>• Some voices may overpower others</li> <li>• Hard to get honesty on sensitive topics</li> </ul>	<ul style="list-style-type: none"> <li>• Difficulties accessing communities/events</li> <li>• Relies on your interpretation</li> </ul>
Resources	<ul style="list-style-type: none"> <li>• Notepad</li> <li>• Post-it notes</li> <li>• Insight grid</li> </ul>	<ul style="list-style-type: none"> <li>• Topic guide</li> <li>• Audio recorder</li> <li>• Notepad</li> </ul>	<ul style="list-style-type: none"> <li>• Topic guide</li> <li>• Audio recorder</li> <li>• Notepad</li> </ul>	<ul style="list-style-type: none"> <li>• Schedule</li> <li>• Audio/video recorder</li> <li>• Flipchart paper</li> <li>• Post-it notes</li> <li>• Online or in person</li> </ul>	<ul style="list-style-type: none"> <li>• Use your senses</li> <li>• A journal</li> </ul>
Example Outputs	<ul style="list-style-type: none"> <li>• Quotes</li> </ul>	<ul style="list-style-type: none"> <li>• Case studies</li> <li>• Journey map</li> </ul>	<ul style="list-style-type: none"> <li>• Case studies</li> </ul>	<ul style="list-style-type: none"> <li>• Visuals (brainstorm, post-it wall, etc.)</li> <li>• Word cloud</li> <li>• Report</li> </ul>	<ul style="list-style-type: none"> <li>• Notes and doodles</li> <li>• Provide context to reporting</li> </ul>

## 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 are recording their information and get their consent where needed (information on gathering consent can be found under 'Consent and Anonymity' in this toolkit section).

### **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 signed consent is needed.

\*See [Anatomy of a Good Sticky Note](#)<sup>3</sup> 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.

For examples of how you can structure your insight grids, see Appendix 3 in our '*Section 2 Templates: Gathering Qualitative Insight*' document. This includes blank templates that you can print out and use, and examples of insight grids being used in practice:

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



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.



<sup>3</sup> <https://userresearch.blog.gov.uk/2014/10/29/anatomy-of-a-good-sticky-note/>

## Creative ways of capturing insight

Consider using creative tools that get your participants involved in capturing their experiences, thoughts, and feelings. See suggestions below or visit [New Philanthropy Capital](#)<sup>4</sup> for more creative methods.



### 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

### 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 our '*Section 2 Templates: Gathering Qualitative Insight*' document here:

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



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.

<sup>4</sup> <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?

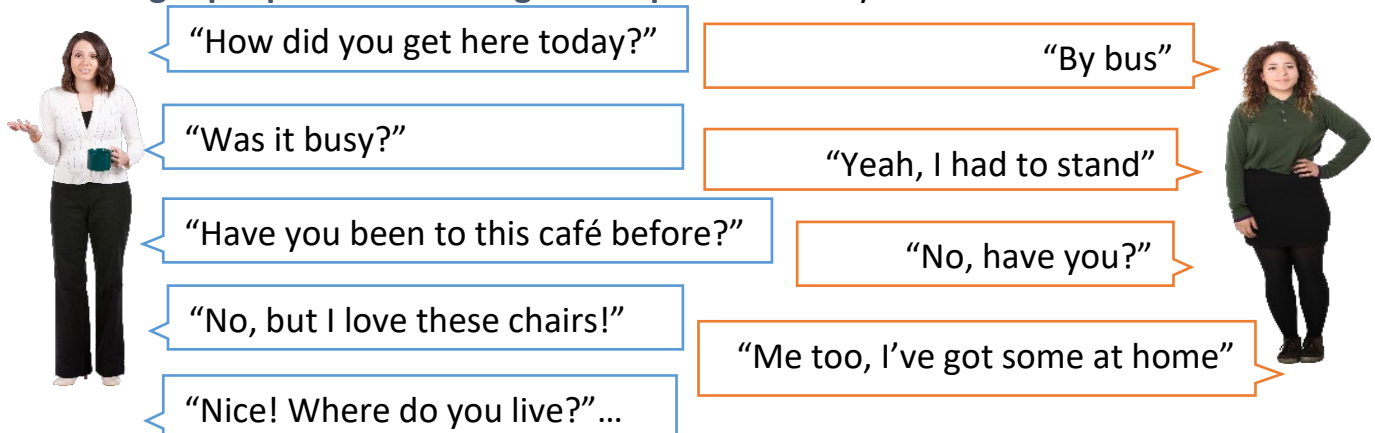


### Open Questions

- 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. To **get people used to being asked questions** early in the conversation:



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 centre?
- Why do you smoke?

For more tips on avoiding bias in question design, see [Healthwatch's](#) guide<sup>5</sup>.

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!

## Recognising difference in communication

The people you speak to may communicate in different ways depending on their background, communication style and/or communication needs.

Examples of differences that might impact on how participants engage with you could relate to: language and translation needs, body language, levels of literacy and understanding, learning difficulties, learning disabilities and physical disabilities, neurodiversity, or sight and hearing impairment.

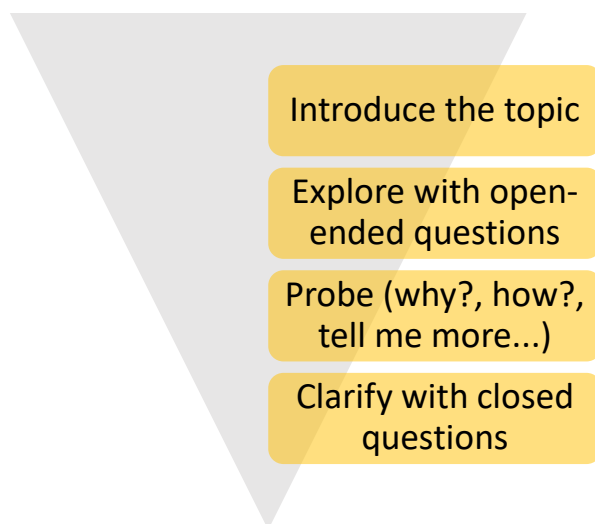
Consider adapting your questions and approach to suit the communication needs of your participants. You could ask what your participant's communication needs are before they share their experiences with you, so they can fully take part in your work. This can also help participants to feel respected and valued for their contribution.

<sup>5</sup>[https://network.healthwatch.co.uk/sites/network.healthwatch.co.uk/files/20191101\\_Managing%20Bias%20Resource%20guidance%20formatted\\_0.pdf](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	<ul style="list-style-type: none"><li>Explore the group's experiences of attending Eurovision as people who use wheelchairs.</li></ul>	Information sheet
	Ground rules and consent	<ul style="list-style-type: none"><li>Mutual respect</li><li>Audio recording</li></ul>	Consent form
	Introductions	<ul style="list-style-type: none"><li>Ice breaker</li></ul>	Name labels
15 mins	Accessibility: enablers and barriers	<ul style="list-style-type: none"><li>How was your experience of attending Eurovision?<ul style="list-style-type: none"><li>Transport, seating, toilets...</li></ul></li></ul>	Flip Chart Pens
10 mins- Break			
15 mins	Ideas brainstorm	<ul style="list-style-type: none"><li>What could make Eurovision more accessible in the future?</li></ul>	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](https://www.wirralinfobank.co.uk) and [Family Toolbox](https://familytoolbox.co.uk)<sup>6</sup>. These are directories of services, community groups, and activities in Wirral that support health and wellbeing. The Family Toolbox provides signposting specific to families.

## Gathering participant consent

### **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 what they would like to do. You can ask for their consent to gather, process, report and store the information they've provided. You can also confirm what information participants would like to be shared about them in your reporting, such as their name, age and any other identifying information.

When asking for consent, it is good practice to get written consent. The Qualitative Insight Team has designed a consent form template with suggested questions and space for you 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 consent form guidance and Appendix 6 for a blank consent form template in our '*Section 2 Templates: Gathering Qualitative Insight*' document here:

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



The Qualitative Insight Team 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](https://www.ukri.org/councils/esrc/guidance-for-applicants/research-ethics-guidance/consent/)<sup>7</sup>.

<sup>6</sup> <https://www.wirralinfobank.co.uk> and <https://familytoolbox.co.uk/>

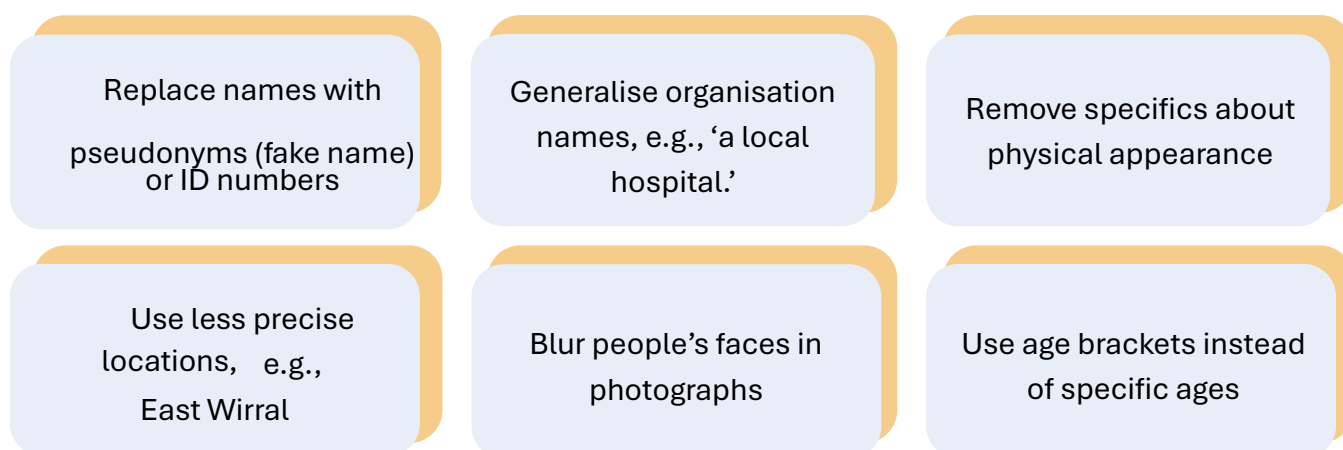
<sup>7</sup> <https://www.ukri.org/councils/esrc/guidance-for-applicants/research-ethics-guidance/consent/>

## Sharing information about your participants

It is important that your participants understand what information will be shared about them in your work. Providing a clear explanation of what identifying information you will share about your participants in your work can help them feel confident to share their experiences with you.

Removing information about participants that might identify them to others is known as anonymisation. This aims to reduce the chances of your participants being recognised in your work when they do not want to be identified.

See below for examples of how you could change identifying information:



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



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, in a separate place to your insights. See the [UK Data Service](https://ukdataservice.ac.uk/learning-hub/research-data-management/)<sup>2</sup> for more guidance on managing and sharing data.

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](https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/)<sup>3</sup> for General Data Protection Regulation (GDPR) guidance for organisations.

If you cannot guarantee participant anonymity, ensure that participants know this and provide them with opportunities to withdraw from your work if they do not feel comfortable to continue.

<sup>2</sup> <https://ukdataservice.ac.uk/learning-hub/research-data-management/> (see 'Storing Data')

<sup>3</sup> <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 Qualitative Insight
3. Bringing Your Findings Together
4. Presenting and Sharing Your Findings
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, please email the Qualitative Insight Team at [qualitativeinsightteam@wirral.gov.uk](mailto:qualitativeinsightteam@wirral.gov.uk).

### About us

Qualitative Insight is a type of research that listens 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.

### Acknowledgements

The Qualitative Insight Toolkit has been designed by the Qualitative Insight Team, Public Health, Wirral Borough Council.

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

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