

The QUAL 'how-to' download guide to qualitative research methods

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Method [ology] is about how you carry out your research.

Qualitative approaches do not seek to prove or disprove a hypothesis through statistics and numbers, but rather can be complementary to such quantitative approaches through exploratory methods of investigation.

Topic guides

For everything apart from observation you'll need a topic guide (also sometimes known as a discussion guide). The topic guide lists areas that you want to explore with your group or individual and is linked to the brief – it must address your research questions.

The topic guide might be in the form of questions, but not closed questions (a closed question is something to which there is only a 'yes' or 'no' answer).

Think of the process like a funnel – start general and then get more specific with the areas of discussion. At the start ask people to talk about themselves and their pastimes, for example, what are their current arts-based interests? Use areas of discussion rather than direct questions – for example “I would like to hear what you think about”, rather than “Do you like ...” – as that's a closed question with a yes/no answer. Don't worry at this stage if you feel the conversation is wandering, you can easily bring them back in after establishing a good rapport (which is the purpose of this introductory, generic discussion) between the group and with you.

For some example topic guides used in QUAL's case study (these examples can be adapted to your own research needs), see the Resources section.

Focus groups and mini focus groups

For a meaningful piece of research, always conduct more than one group, ideally four or more, because you need to compare data from different groups.

Size of group

A full focus group would usually comprise 6-8 people while a mini focus group is 3-4. In deciding between the two, you might want to consider your budget, your time to both recruit and conduct the focus group and your capacity to project manage the research. You also might want a more intimate group for a reason, for example, if the area of discussion is sensitive or if you're not so confident about managing a larger group as a first-time researcher. Obviously, you won't gather as many opinions and perspectives from a smaller group but often a smaller number allows for a depth of exploration that you can't always achieve with 6-8 people.

Set up

In choosing a location, you ideally need somewhere neutral, relatively quiet but public (think about your personal safety). Set the room up before the group comes with chairs in a circle and a table in the middle for your watch and recording device. If you're conducting more than one group in one evening session, for example, you'll also need a helper to welcome the next group while you finish up with the first. Offer the group refreshments to make them feel comfortable and feel relaxed. If you're using incentives (monetary or a free ticket, for example), always give these out at the beginning of the group and ask participants to sign for them (for proof of receipt).

Some other things to consider (although these may sound obvious), but: make sure there's a clock in the room, or that you have a watch (a good way to avoid awkward and obvious glances at your wrist as you try to keep time, is put your watch in front of you on the table so that you're not interrupting the flow of the conversation). Make sure your smartphone is charged (it will have a recording device on it and the quality is typically very good). If you're using tasks or stimuli (e.g. you want the group to watch a video or make notes) make sure everything is ready and prepared (for example have extra pens and paper or check the Youtube or audio clips you are going to use).

Preliminaries and assurances

Establish a rapport with the group – introduce yourself and the research (but don't go into detail at this stage), ask them to introduce themselves and memorise their names (jot them down), be conversational and relaxed. Before you continue, give assurances of confidentiality (for example names will not appear in reports or be shared with any third party organisation) and explain that you will be recording the conversation if everyone agrees. If there are objections to recording, you must not proceed with recording, but take notes only.

The group should already know from your invitation how long the session will take, but it's a good idea to remind them at this stage. A full focus group would normally take 1.5 hours, a mini group is usually shorter at 1 hour, but there is some give and take here.

Once you have permissions start the recording device and take a mental note of the time.

Managing your group

Use people's first names to draw them into the conversation (it really helps in transcribing too so that you know who said what). Ensure no-one dominates/is too loud/too quiet so that no-one can hear. Use eye contact and body language/gestures to bring people in or cut out dominant voices if necessary.

Keeping on topic and to time

Go where the conversation takes you if it's interesting and relevant to your research questions – qualitative research is about deep exploration not sticking to a script. That said, make sure you cover your topic guide by (unobtrusively) checking it as you go along.

Towards the end, it's sometimes appropriate to introduce a group exercise as a last task. Something like "What are the 3 top things that the company could do to get you to attend more regularly?". Such tasks generate discussion and debate among the different groups – be sure to observe and take notes as recordings often don't pick up the nuances of these groupwork discussions. You will find examples of these approaches in the Case Studies in the Resources section, particularly in the Red Note Ensemble case study.

Close the group by summing up key outcomes, key thoughts and takeaways. Be mindful that you could build on and explore the outcomes in an iterative way with other subsequent groups. This iterative process should continue throughout the research process – in such a way you become aware of the key themes emerging ahead of your transcription and analysis processes (that will allow you to identify the detailed evidence in the verbatim quotes).

In-depth interviews

These can be one to one or 'paired' (with 2 people) interviews depending on your research aim and sample selection. For example, one to one in-depth interviews are most appropriate when discussing potentially sensitive issues; a paired in-depth is a cost effective and time efficient way of gathering data from a larger sample size. A paired in-depth with two people that already know each other is also a way to generate and establish rapport from the get go.

In-depths can be used for subjects who are time-poor, so keep it to 40 minutes maximum. Often the interviewer would go to the interviewee's place of work or a nearby café (but make sure it's quiet for your recording).

You follow the same process as above with a topic guide and manage the interview in the same way as with a group. Using the phone or Skype can be cost-effective and practical, but you lose the benefits of the face to face experience.

Observation and informal interaction

Close observation of an audience, users or participants is often used in audience development, observing people's reactions and behaviours. This is valid (ethnographic) research and can be used to support and inform your more formal approaches.

Be a part of the audience and take notes: how engaged are the audience? are they comfortable in the space or with the experience? These observations can feed into and inform a topic guide. This approach can also be incorporated into the focus group design as it was in the Magnetic North Case Study in the Resources section.

Top tips

- If your research is tied into a performance or a show, do a 'before and after' focus group to capture the group's feelings and opinions (see the Magnetic North Case Study in the Resources section)
- Don't underestimate observation as a method – it's something you're likely to do anyway, and it's free
- Be confident and proactive as a researcher about managing the group dynamic and making sure everyone has a say
- Be open to what emerges - go with the flow if it's interesting and relevant – don't feel you have to stick to a strict script. But make sure you cover your topic guide.
- Time management: you might find it helpful, particularly as first-timer to allocate chunks of time per topic guide section. Leave the bulk of your time to the key discussion areas that address your research aims and questions.