Introduction to Qualitative Research

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Silver STEAM

Ollscoil na Gaillimhe University of Galway

21 Sci science 27 Co communication

Erasmus+

A little bit about me...

EVIDENCE SYNTHESIS IRELAND

QUESTS
QUALITATIVE RESEARCH IN TRIALS CENTRE

Cochrane Methods

Ollscoil na Gaillimhe
University of Galway

A little bit about you …

Name, role, something about yourself?

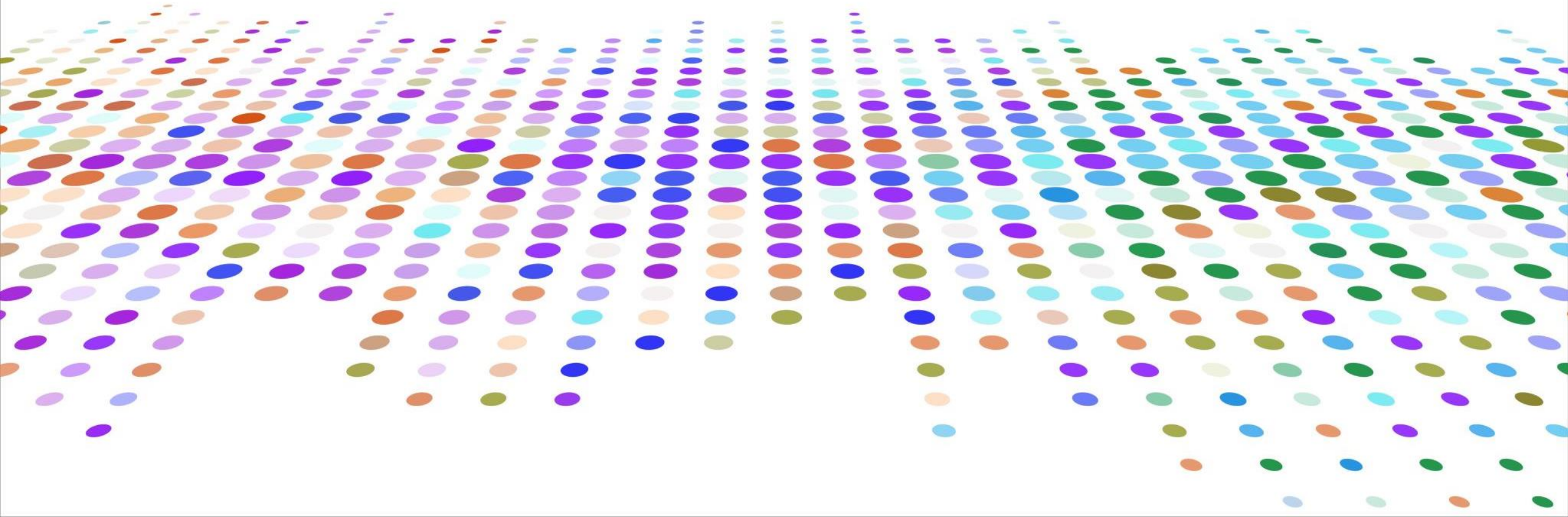
What would you like to gain from this workshop?

Workshop overview:

- By the end of this workshop, I hope you will have a greater insight into:
  - Why qualitative methodologies are essential for research and what unique insights they provide
  - The difference between qualitative methodologies and methods
  - Key qualitative research methods and how to choose the right approach
  - Ethics and inclusivity
  - Introduction to interviewing and analysis*
  - How to ensure that your research is rigorous and trustworthy
  - When you have enough data for your study

* These will be explored further at the in-person workshop

I can be flexible… anything you wish to add?



Understanding Qualitative Research Methodologies

Why Qualitative Research Matters and philosophical foundations.

Aims and Objectives

Establish the importance and value of qualitative research

Introduce research paradigms and philosophical foundations of approaches to qualitative research

Distinguish between methodology (the why and philosophical approach) and methods (the how and practical doing)

What is a Research Paradigm?

- “A research paradigm may be viewed as a set of basic beliefs that deals with ultimates or first principles. It represents a worldview that defines, for its holder, the nature of the “world”, the individual’s place in it and the range of possible relationships to that world and its parts”
- “A basic belief system or worldview that guides the investigator”

- Guba and Lincoln (1994, p107)

Why Paradigms Matter?

Research paradigms determine:

What questions you ask
How you collect data
How you analyse the data
What you consider valid knowledge
How you interpret results

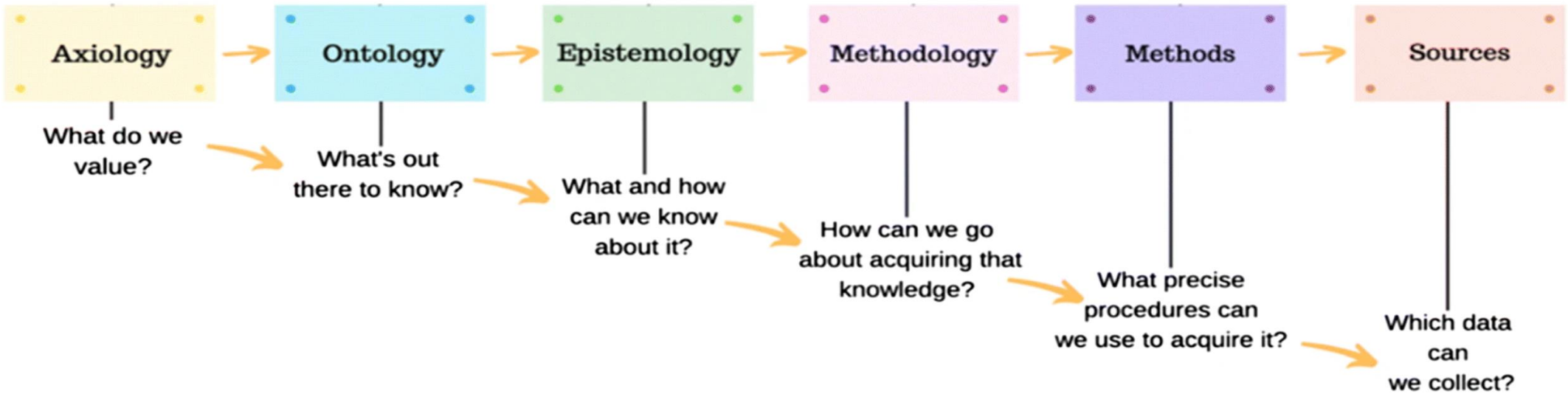
Paradigm at its most *basic* overview

Ontology	What is reality?
Epistemology	How do we know reality?
Methodology	How do we study reality?

Guba and Lincoln (1994)

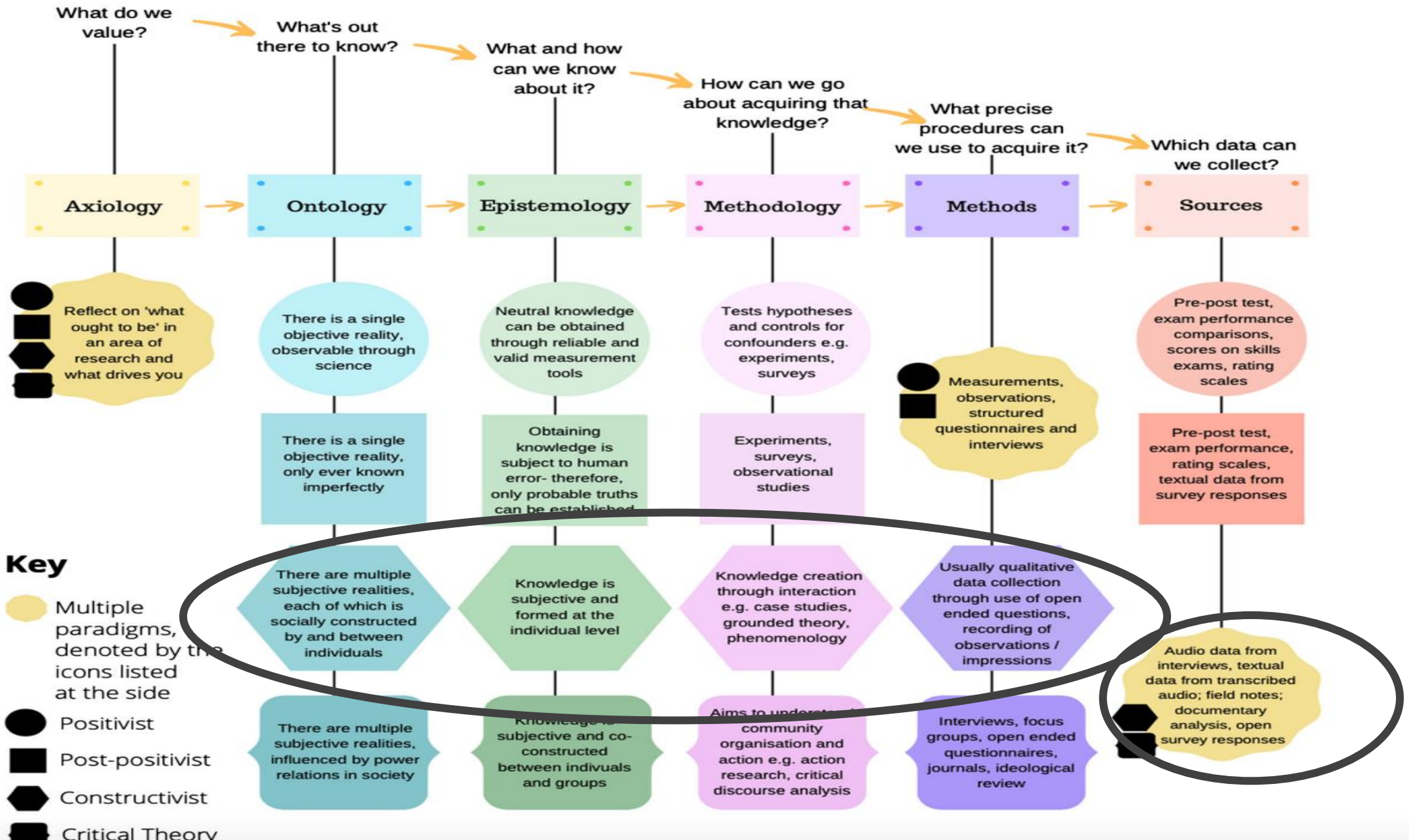
Fig. 1

From: A Medical Science Educator's Guide to Selecting a Research Paradigm: Building a Basis for Better Research



The building blocks forming a piece of work's research paradigm and how they interrelate. Image is an adapted version of Grix's paradigmatic building blocks [15]. Image adapted by authors to include axiology as an important block not originally detailed

- Source: Figure developed by Brown MEL, Dueñas AN. A Medical Science Educator's Guide to Selecting a Research Paradigm: Building a Basis for Better Research. Med Sci Educ. 2019 Dec 27;30(1):545-553. doi: 10.1007/s40670-019-00898-9.


What do we value?
What's out there to know?
What and how can we know about it?
How can we go about acquiring that knowledge?
What precise procedures can we use to acquire it?
Which data can we collect?
Axiology
Ontology
Epistemology
Methodology
Methods
Sources
Reflect on 'what ought to be' in an area of research and what drives you
There is a single objective reality, observable through science
Neutral knowledge can be obtained through reliable and valid measurement tools
Tests hypotheses and controls for confounders e.g. experiments, surveys
Measurements, observations, structured questionnaires and interviews
Pre-post test, exam performance comparisons, scores on skills exams, rating scales
There is a single objective reality, only ever known imperfectly
Obtaining knowledge is subject to human error- therefore, only probable truths can be established
Experiments, surveys, observational studies
Pre-post test, exam performance, rating scales, textual data from survey responses
There are multiple subjective realities, each of which is socially constructed by and between individuals
Knowledge is subjective and formed at the individual level
Knowledge creation through interaction e.g. case studies, grounded theory, phenomenology
Usually qualitative data collection through use of open ended questions, recording of observations / impressions
Audio data from interviews, textual data from transcribed audio; field notes; documentary analysis, open survey responses
There are multiple subjective realities, influenced by power relations in society
subjective and co-constructed between indivuals and groups
community organisation and action e.g. action research, critical discourse analysis
Interviews, focus groups, open ended questionnaires, journals, ideological review
Key
Multiple paradigms, denoted by the icons listed at the side
Positivist
Post-positivist
Constructivist
Critical Theory

Pause Moment

- Think of reasons why you would conduct a qualitative rather than a quantitative study?
- What kinds of questions do qualitative studies answer?

Table 2. Reasons for Qualitative Research.

Source: TABLE DEVELOPED BY Lim, W. M. (2024). What Is Qualitative Research? An Overview and Guidelines. *Australasian Marketing Journal*, *33*(2), 199-229. https://doi.org/10.1177/14413582241264619

Reason	Focus area	Key points
Necessity	Addressing complex social phenomena	• Explores complexities of human behaviors and interactions • Makes sense of complex social contexts • Prevents oversimplification and misinterpretation of social realities
Importance	Generating rich insights and human-centered understanding	• Provides a human-centered understanding of the world • Leverages methods like in-depth and focus group interviews as well as participant observation • Useful for developing theories, informing policy, and making sure interventions are culturally sensitive and socially responsible
Relevance	Connecting research to real-world issues	• Applicable to real-world issues • Grounded in lived experiences, reflecting the complexities and responsive to the needs of the modern world • Relevant for social scientists, policymakers, and stakeholders interested in understanding and making the world a better place
Urgency	Responding to rapid social change	• Addresses the need for timely and relevant insights in a rapidly changing world • Social phenomena are evolving due to political, economic, social, technological, environmental, and legal (PESTEL) forces • Contributes to decision-making, interventions or solutions, and overall well-being

Table 1. Features of Qualitative Research.

Aspect	What qualitative research is	What qualitative research is not
Focus	• Existence	• Generalizability
Nature	• Emphasizes depth and richness of context and voice (experiences and perspectives) • Fundamentally constructive or interpretive, exploring "what," "why," "when," "where," "who," and "how" (or the "5W1H") of social phenomena • Promotes reflexivity and values subjectivity as a source of depth and insight	• Not limited to quantifying occurrences or providing surface-level explanations • Not merely anecdotal or based on unfounded subjective interpretations
Method	• Embraces openness and thus utilizes means such as open-ended questions, in-depth and focus group interviews, and participant observation	• Shuns narrowness and thus does not adhere strictly to numerical or statistical measures
Insight	• Committed to capturing complex, nuanced details of social behaviors and interactions • Captures a spectrum of human experiences and perspectives • Constructs reality by the researcher and/or participant • Thrives on adaptability and flexibility	• Does not provide a detached or purely objective account of social phenomena • Not a rigid or one-size-fits-all methodology
Rigor	• Demands systematic and rigorous approach to data collection and analysis • Maintains rigor through systematic methodology, reflective practice, and trustworthiness criteria	• Not less rigorous or valuable than quantitative research
Relevance	• Suitable for exploring complex, context-rich phenomena • Depends on research contexts, questions, and objectives • Example: Understanding the motivations behind consumer behavior in a new market	• Not universally applicable or appropriate for every research context, question, or objective • Example: Not the best approach for determining the percentage of a population holding a particular opinion

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Table 3. Summary of Strengths and Shortcomings of Qualitative Research.

Strength	Explanation	Shortcoming	Explanation	Mitigation strategy
Contextual relevance	• Delves into specific circumstances and settings • Ensures findings are deeply grounded in real-world contexts • Facilitates contextually-informed strategies and solutions	Limited generalizability	• Often involves smaller, specific samples • May not represent broader populations • Can limit the scope of applicability of findings	• Clearly state study boundaries and contexts • Employ triangulation methods • Use mixed methods for more robust findings
In-depth insights	• Offers rich, nuanced insights into complex phenomena • Probes deeply into specific contexts, experiences, perceptions, and interactions • Provides a comprehensive understanding for informed and tailored interventions	Resource intensive	• Demands substantial resources (e.g. effort, time, money, and storage) • Data collection methods like in-depth interviews are time consuming • Data analysis methods like content analysis are tedious	• Employ efficient project management • Invest in training to enhance researcher efficiency • Utilize software tools for qualitative data recording and analysis
Holistic perspective	• Considers all relevant aspects and their interrelations • Provides a comprehensive view • Essential for theory development and pragmatic solutions	High research complexity	• Involves rich and voluminous data • Requires expertise for analysis and interpretation	• Adopt a systematic and organized approach • Implement clear coding frameworks and engage in peer debriefing • Invest in skill development and training for researchers
Recognition of participant voice	• Values and focuses on participant experiences and perspectives • Ensures authenticity and grounded findings • Reflects participant realities	Highly dependent on researcher knowledge and skill	• Quality hinges on researcher's abilities in data collection and interpretation • Requires deep disciplinary knowledge and methodological skillset	• Access to resources on latest methods and techniques in qualitative research • Engage in ongoing training and professional development • Foster a culture of collaborative learning and mentorship
Scope for reflexivity and flexibility	• Allows for adjustments in methodology based on emerging data (reflexivity) • Adaptable to changing contexts (flexibility) • Ensures the research process remains responsive and relevant	Susceptible to researcher bias	• Interpretive nature opens possibilities for subjective influences • Researcher's beliefs and values can color interpretation	• Commit to reflexivity and constant self-reflection • Maintain a transparent and detailed audit trail • Seek external feedback through peer review to add scrutiny

Source: FIGURE DEVELOPED BY Lim, W. M. (2024). What Is Qualitative Research? An Overview and Guidelines. *Australasian Marketing Journal*, *33*(2), 199-229. https://doi.org/10.1177/14413582241264619

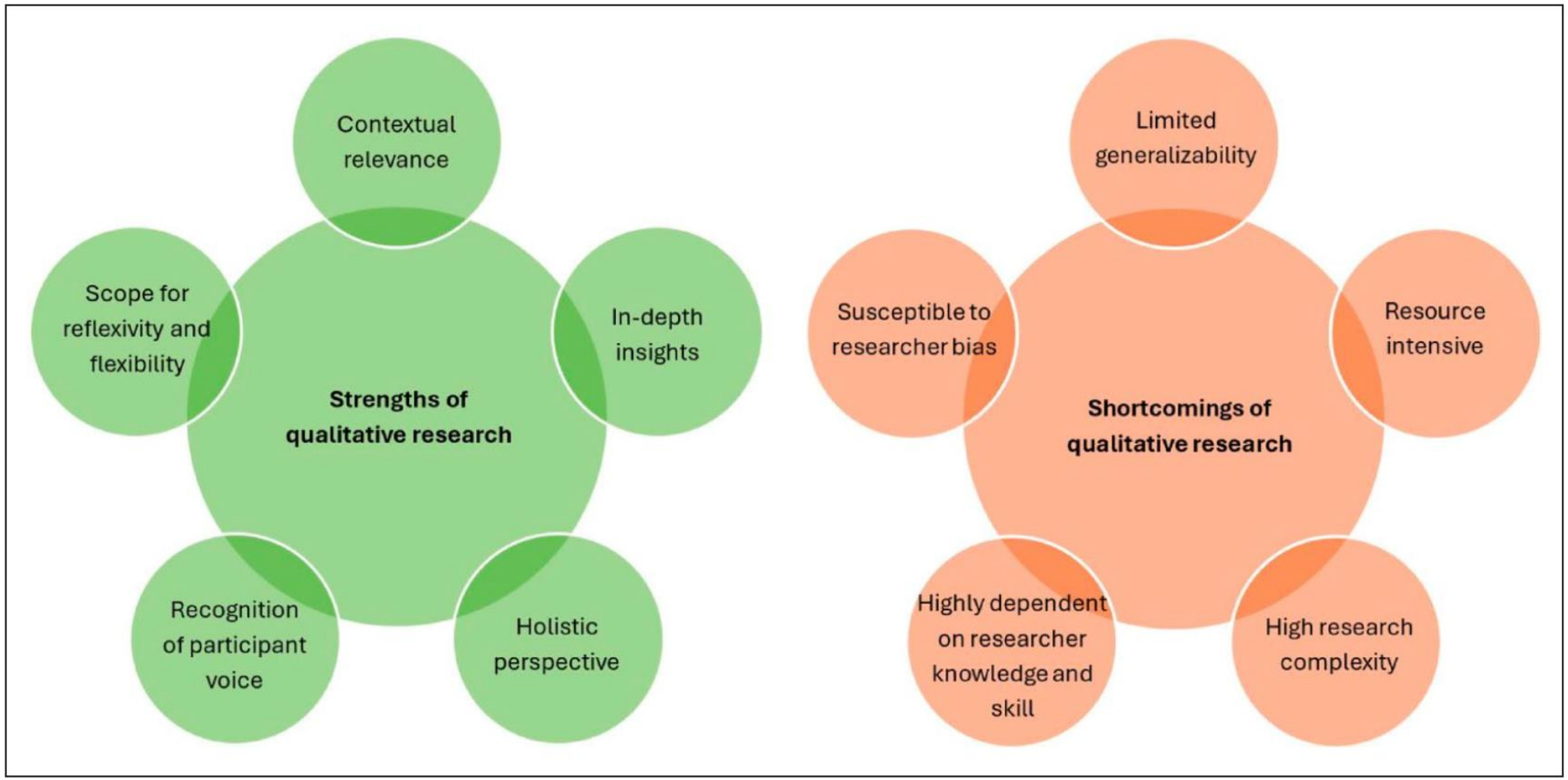

Figure 1. Overview of strengths and shortcomings of qualitative research.

Table 1. The Basic Principles of Qualitative and Quantitative Research

Characteristic	Qualitative Research	Quantitative Research
Purpose	Hypothesis generating.	Hypothesis testing.
Reasoning	Inductive.	Deductive.
Questions	How? What? Why?	How many? How much?
Data collection and sources	Usually, primary data collection using a variety of methods, including semistructured interviews, focus groups, among others.	A mixture of primary and secondary data collected through surveys, registries, medical records, administrative claims, among others.
Data analysis	Driven by observations, sometimes based on a theoretical framework.	Driven by hypothesis.
Outcomes	Descriptions, themes, and theories as supported by text from written summaries that may include quotes and narrative vignettes.	Numerical descriptive summaries or measures of association among study variables.

Source: TABLE DEVELOPED BY Bazen A, Barg FK, Takeshita J. Research Techniques Made Simple: An Introduction to Qualitative Research. J Invest Dermatol. 2021 Feb;141(2):241-247.e1. doi: 10.1016/j.jid.2020.11.029. PMID: 33504436.

Overview (traditional approach) … list of ‘defining features’ but not exclusive

Grounded Theory (GT)

- “GT focuses on a process, action, or interaction that has distinct steps or phases that occur over time
- In a GT study, the researchers seeks, in the end, to develop a theory of this process, action or interaction
- Memoing involves the GT researcher writing down ideas about the evolving theory
- The data and analysis procedures and considered to be undertake simultaneously and iteratively
- The induction procedures involved in data analysis are described in relation to the type of GT approach
- A detailed description of the theoretical model emerging from the data is conveyed. This can take many different forms including both written and visual representation”

- Creswell & Poth (2025: 98)

Phenomenology

- “An emphasis on a phenomenon to be explored
- The exploration of the phenomenon with a group if individuals who have all experienced the phenomenon
- A philosophical discussion about the basic ideas involved in conducting a phenomenology
- In some forms of phenomenology, the researcher brackets themselves out of the study by discussing personal experiences with the phenomenon
- A systematic data analysis that moves from narrow units of analysis, to broader units, and a final descriptive ‘essence’ of the phenomenon
- A descriptive ending for phenomenology of the essence of participants’ experience with the lived phenomenon”

- Creswell & Poth (2025: 89)

Ethnography

- “Ethnographic research focuses on developing a complex description of the culture of a group, the entire culture-sharing group or a subset of that group
- Ethnographic researchers look for patterns among the groups various activities that develop over time
- Ethnographic researchers use theory to focus their attention
- Ethnographic researchers engage in extensive data collection and fieldwork
- An ethnography includes verbatim quotes as well as the views of the participants (emic) and of the researcher (etic)
- An ethnography represents a cultural portrait of a culture-sharing group or a subset of that group”

- Crewell & Poth (2025: 107)

Case Study

- ”Case study research begins with the identification of an intention for the case study and a focus of analysis on the specific case or cases that will be described and analysed
- The key to the case identification is that it is bounded and relevant to the intent of conducting the case study
- The intent of conducting the case study is important to focus the procedures for the particular type
- A case study represents and in-depth understanding of the case, drawing on many forms of data
- The selection of how to approach the data analysis in a case study will differ and often depend on type
- The case study description involves identifying and interpreting themes
- Case studies often end with conclusion formed by the researcher about the overall meaning delivered from the case / cases”

- Crewell & Poth (2025: 116)

Narrative Inquiry

- “Narrative researchers enable collaborative storytelling about the lived experiences of individuals
- Narrative stories tell of individual experiences, and they may shed light on the identities of individuals and how they see themselves
- Narrative stories occur and are described within specific places or situations
- Narrative stories are gathered thought many different forms of data including conversations, observations, and artifacts
- Narrative stories are analysed using varied strategies
- Narrative stories heard by researchers and co-created with participants are often shaped into a chronology”

Not static … Qual evolving and developing

https://a-z-animals.com/animals/lists/the-dark-history-of-africas-big-five-and-their-conservation-status/

Pause Moment

- Can you think of other qualitative methodologies?

Fig. 1

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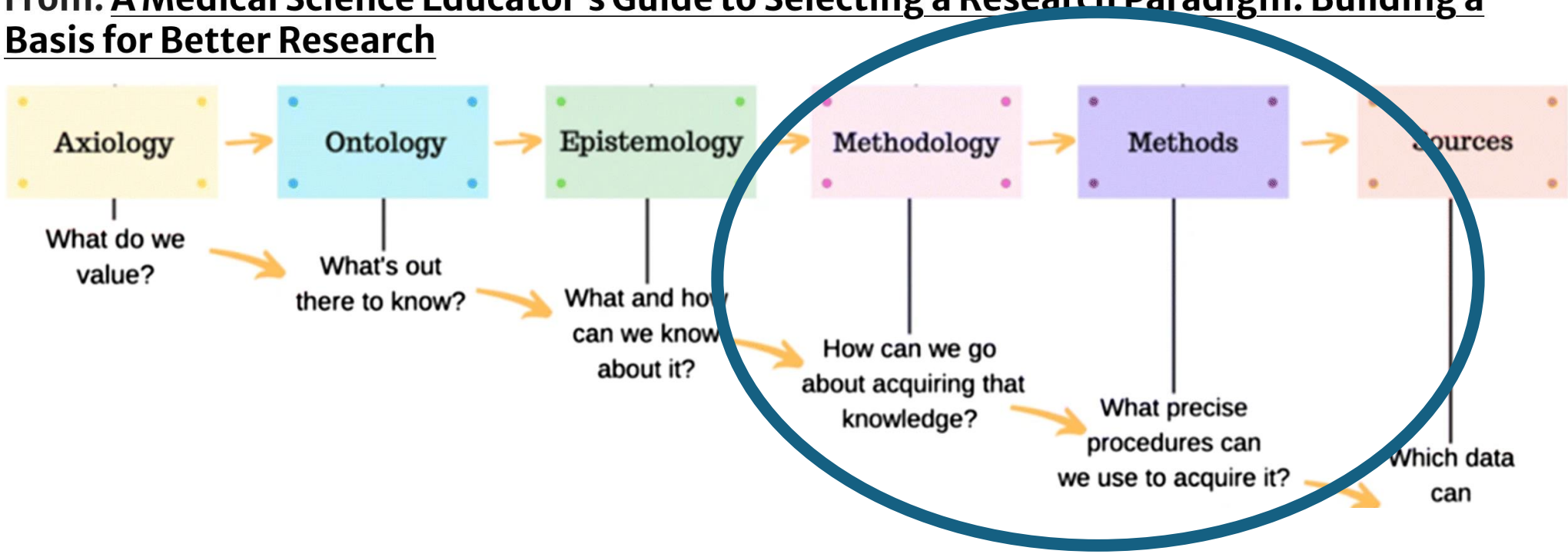

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Qualitative Research Methods

Learning Objectives:

Describe at least four key qualitative data collection methods and their purposes

Explain how different methods align with different methodological approaches

Select appropriate methods based on research questions and methodological stance

Understand the practical considerations in implementing different qualitative methods

Overview of qualitative data collection

- **Typically gathering data about individuals' experiences and perceptions of a phenomena, but can also capture interactions and activities of people pertinent to the study**
- **Usually narrative in nature- accounts from participants or the researchers**
- **Can be supported with documentary evidence, photographs, artefacts also**
- **Person-centredness and ethics are key- People are not subjects!**
  - **Ongoing process consent (Houghton et al. 2010)**
- **Qualitative data collection is emotional work (Lustick et al. 2024)- reflexivity and self-care are needed**
- **Consider where online formats may or may not be useful**

Main methods of data collection

- Interviews (Individual and focus groups)
- Observations
- Documentary analysis
- Creative methods, e.g. Photovoice, photo elicitation

Interviews

- Interviews can be unstructured, semi-structured or structured depending on the focus of your research.
- Unstructured interviews usually start with a single question and followed by probes.
- Semi-structured are guided by a number of questions for relevance to the research question but allow for flexibility also.
- Structured interviews have a pre-defined set of questions and more suited to quantifiable data.

(Polit and Beck 2020)

Focus Group Interviews

- Focus groups utilise group dynamics and synergies for accessing rich information (Polit and Beck 2020).
- For discussion:
  - When would focus groups be useful?
  - How many people should be in a focus group?
  - Should the group be homogenous?
  - Challenges of focus group interviewing?

Interviewing good practices

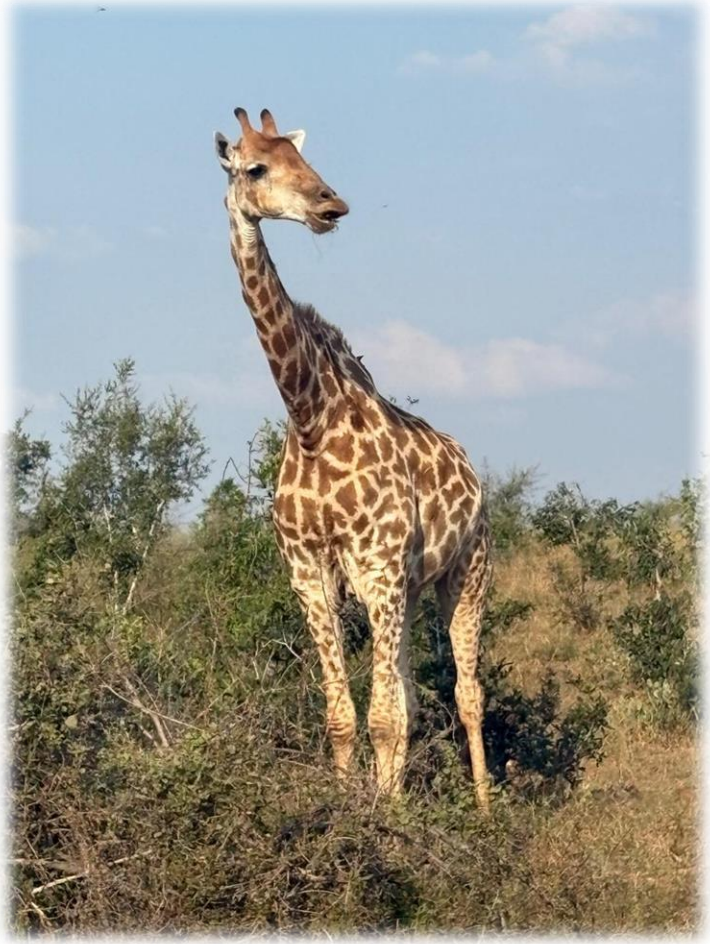
Kallio et al. (2016) propose five stages:

1. identifying the prerequisites for using semi-structured interviews;
2. retrieving and using previous knowledge;
3. formulating the preliminary semi-structured interview guide;
4. pilot testing the guide; and
5. presenting the complete semi-structured interview guide.

We will look more at interviewing in the next pause moment

Observations

- Looking at people's pattern of behaviours in naturalistic settings
- collecting data using one’s senses, especially looking and listening in a systematic and meaningful way” (McKechnie, 2008, p. 573).
- Participant observation is where the researcher participants in the functioning of the social group. They observe, ask questions, record information (Polit and Beck 2020).
- "Prolonged engagement"



Observations continued...

- Non-participant observation: The researcher does not participate in the social interactions but rather observes.
- Discussion:
  - What are the advantages of observation over self-reported data?
  - What are the "data" in this instance?
  - Will researcher presence impact on how people behave?

Observations good practices

- Establishing rapport- gaining access
- Safety protocols
- Clarify positioning: single, mobile, multiple
- Clarify timing: set time periods, particular events
- Piloting
- Remember it is a privilege

Documentary Analysis

- Documentary approaches are being increasingly used in health care research (Gorsky and Mold 2020).
- Documents can evidence from other sources such as interviews and observations to develop a better understanding of the context (Shah and Corley 2006, Houghton et al. 2017)
- Local, National and International guidance and policies
- Discussion:
  - Let's think of documents relevant to health care settings?
  - For example, nurses' stress...

Documentary Analysis best practices

- Clarify purpose- not just tokenistic, how will the findings be integrated with other data collected?
- Consider how you will analyse?
  - Commonly content analysis
  - Present as a matrix
  - Integrate with a framework, e.g. Consolidated Framework for Implementation Research (CFIR) https://cfirguide.org/constructs/

Visual and Creative Methods

Photo-elicitation is using photographs during a research interview to generate verbal discussion (Shaw, 2021)

Photo voice: "The goal of using participatory photovoice is to inform policy and decision making and incorporate the voices of marginalised groups on issues that affect them" (Bandauko and Arku 2023)

Collage, sandboxing, Lego, Drawing, Fuzzy Felt

Dog

Petting/cuddling

Walking

Talking/playing

Feeding

Farm pet

Petting/cuddling/feeding

Drawing/story sharing

DISCUSSION: Which method to choose?

- Phenomenology- study of the lived experience
- Ethnography- study of culture and social interactions
- Grounded Theory- construct a theory to explain social processes or phenomena
- Case Study- in-depth understanding of the "case"
- Narrative Inquiry-story telling about identity

Interviews

Study Title:

- Navigating Later Life Journeys: A qualitative study to understand the travel experiences of adults over the age of 70.

Aim of the Study:

- The aim of this qualitative study is to explore and understand the travel experiences of adults, aged 70 and older.

Rationale for this study:

- With an aging population and increasing life expectancy, understanding the travel experiences and needs of older adults is crucial for developing age-inclusive tourism policies and practices. This study will provide valuable insights to inform the travel industry, interested parties, and service providers about how to better serve the growing demographic of people over the age of 70 travelling.

Pause Moment

- What sorts of questions should we ask?

Qualitative sampling, ethics and PPI

Qualitative sampling

- Not randomly selected
- Small and studied intensively
- Not always pre-specified

- Non-probability sampling in qualitative research
  - Purposive/purposeful sampling
  - Theoretical sampling
  - Snowball sampling

Theoretical Sampling

- Used in grounded theory whereby the researcher jointly collects, code and analyses data
- Sampling is driven by the emerging theory
- Back and forth technique that can be quite complex
- Iterative (Abrams 2010)
- Sampling frame used to map decisions

Snowball Sampling

- Asking early informants to refer other study participants
- Efficient for larger communities
- Easier to gain trust

Purposive sampling

- Selecting the case that will most benefit the study
- Justify the inclusion of rich sources
- Often requires **mapping** potential respondents or study sites
- More than just convenient-done rigorously and systematically

Representation and comparison

- Goals:
  - to find a sample representative or typical of population
  - Open possibility of comparisons or replications
- **Maximum variation sampling**
  - **Let's consider some examples?**
  - Common patterns across diversity are of interest

Representation and comparison

- Homogenous sampling
- Typical case sampling
- Deviant case sampling
- Critical case sampling
- Criterion sampling

Method specific considerations

- Ethnography
  - talk to many relevant people but few **key informants**
  - Sampling **observations** also-time, context, people (Higginbottom 2004)
- Phenomenology
  - Typically less than ten
  - Individuals with **lived experience**
- Grounded Theory
  - Start with broad **maximum variation**
  - Then **theoretical sampling**
  - **Confirming** and **disconfirming** cases

Think points

- Identify potential gatekeepers
- Consider reasons why they might support research?
- Consider reasons why they might not support research?

Gaining Access

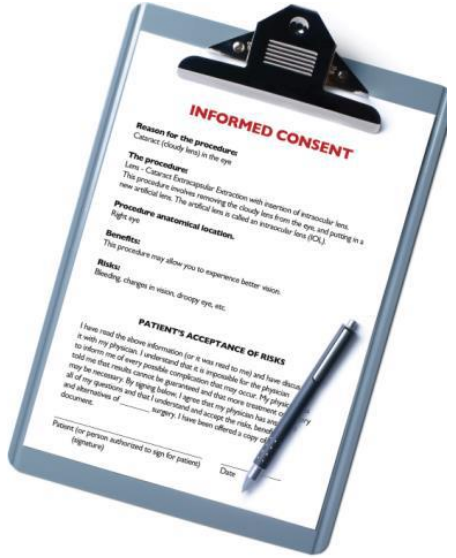
- “Gatekeepers” control access to participants (Jessiman 2013)
- Informal access and building rapport is critical (Devers and Frankel 2000, Polit and Beck 2012)
- Mutual trust (Høyland et al. 2015)
- Early contact needed
- Interpersonal skills
- Familiarity with customs and language
- Candid and genuine about research process

Recruitment

- Support from gatekeepers does not mean support from potential participants
- Participant information leaflets (PILs)
- Incentives? (Jessiman 2013)
- Refreshments (Coyne et al. 2016)
- Time to consider
- Convenience (Coyne et al. 2016)
- Reminders
- Coercion
- Vulnerable groups? Indirect recruitment (Abrams 2010)
- FOCUS GROUPS

Qualitative Research Ethics

- Informed consent:
  - Evolving nature (Houghton et al. 2010)
  - “informed process consent” (Munhall 1988)
- Risk-benefit:
  - Potential for distress
  - researcher-participant relationship
- Data Protection:
  - Confidentiality versus anonymity



Key Points

- Consider your design
- Early planning and negotiating access
- Don’t be afraid of smaller numbers
- Interviewing and data collection skills crucial for getting the most from informants
- Piloting!
- Think about the analysis…

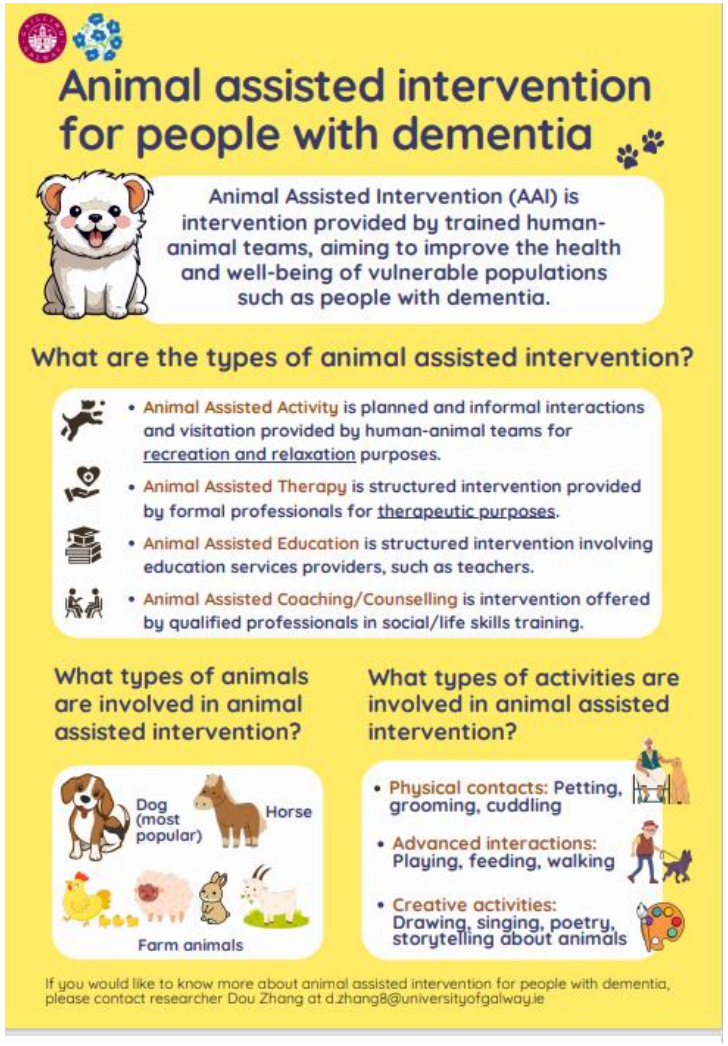
Engaging Interest Holders: PPI

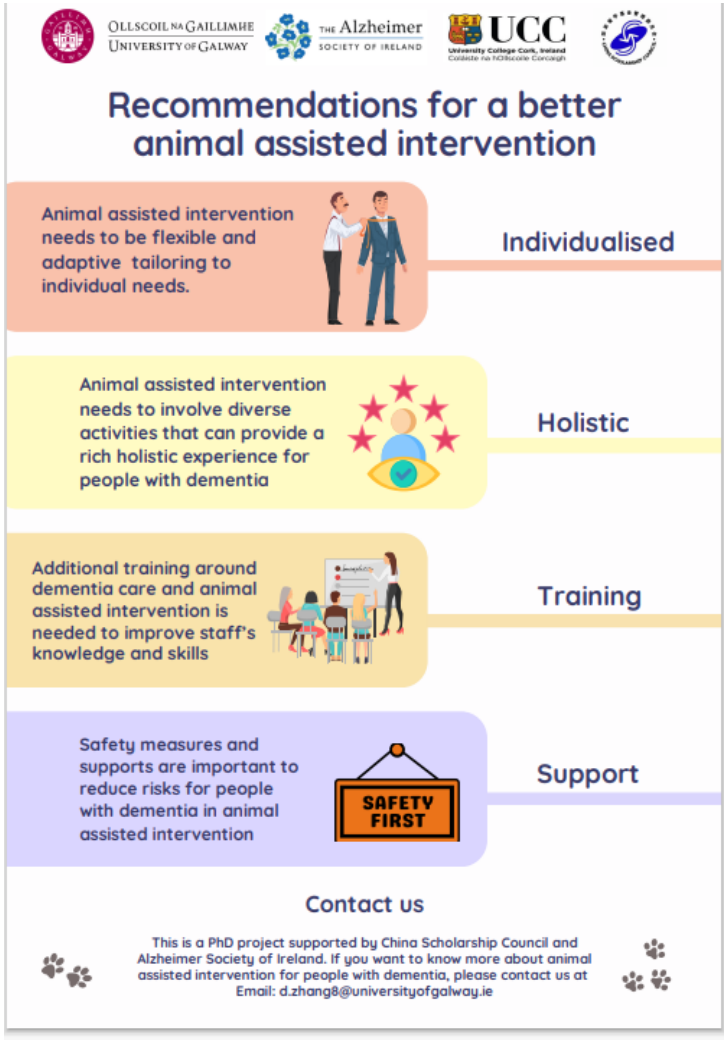
PPI IGNITE NETWORK

Engaging Interest Holders: Co-Design

- Co-design is an approach that actively and equitably involves interest holders in development and implementation of service (Benz et al., 2024; Sanders & Stappers, 2008).
- "Co-design is becoming important in the face of complex social, political, environmental, educational and technological political, environmental, educational and technological issues where no one person has the knowledge and skills to understand and solve them, and where a different approach is needed to empower people to participate and take control of their own life and environment" (Zamenopoulos and Alexiou 2018, p10).

Engaging Interest Holders: Plain Language Summaries and Infographics





- Consider Inclusivity
- Language
- Font
- Colour and Imagery
- *"Your posters are very lovely. I could see people being really interested in the booklet if they were colourful….I think the more colourful ones will be more eye catching"*

(Nuala PPI contributor)

Rigour in Qualitative Research

Rigour in Qualitative Research

To introduce the concept of Rigour in Qualitative Research

To understand strategies for ensuring trustworthiness and quality

To highlight the difference between the concepts reliability / validity and trustworthiness

Rigour and Quality

Credibility
Dependability
Confirmability
Transferability

(Lincoln and Guba, 1985)

What do these terms mean?

Credibility-Value and believability of the findings

- Prolonged Engagement and Persistent Observation
- Triangulation
- Peer debriefing
- Member checking

Dependability: Stability of the data Confirmability: Accuracy of the data

- Audit Trail
  - Decisions
  - Rationale
  - Trustworthiness

Reflexivity

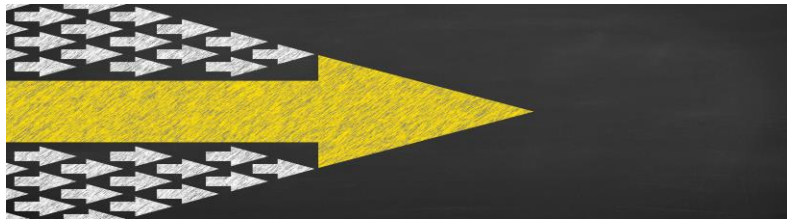
Dumbledore: "*I use the Pensieve. One simply siphons the excess thoughts from one's mind, pours them into the basin, and examines them at one's leisure. It becomes easier to spot patterns and links, you understand, when they are in this form.*"

- As a group
- As an individual
- Why?
- Nice example: Reflexivity Paper

Transferability

- Thick Description:
  - detailed and appropriate descriptions for the reader to make informed decisions about the transferability of the findings to their specific context
  - rich and vigorous presentation of the findings, together with appropriate quotations
  - Implications for the conduct within a trial?
  - What other contexts could the FAKE trial findings be transferable to?

Are we now moving to …?



"Methodological congruence/ integrity and Reflexive openness/transparency"

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Routledge
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Reporting guidelines for qualitative research: a values-based approach

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Introduction to Qualitative Analysis

Introduction to Qualitative Analysis:

- Explain the basic process of thematic analysis
- Practice initial coding of qualitative data
- Identify developing themes in a small dataset

Qualitative Data Analysis

- “Qualitative data analysis … is a complex, creative process that is ongoing, interactive, inductive and reflexive. It occurs throughout the study from the initial conception of the idea to the production of the final report or account. While it can be quite different from the processes used to analyse quantitative data, nevertheless it still needs to be rigorous, systematic and transparent” (Lathlean 2010, p 435)
- Hall (2003, p.495) researcher will need to use “sensory impressions, intuition, images, experiences, and cognitive comparisons in categorising the findings and discerning patterns”
- Thorne (20000, p.68) “unquestionably, data analysis is the most complex and mysterious of all the phases of a qualitative project”
- Basit (2003, p. 143) “it is dynamic, intuitive, and creative process of thinking and theorizing”
- “Analysis brings moments of terror that nothing sensible will emerge and times of exhilaration from the certainty of having discovered ultimate truth. In between are long periods of hard work, deep thinking, and weight-lifting volumes of material” (Halcom’s Iron Laws of Evaluation Research, cited in Patton 2002)
- Some authors use language that accentuates the air of mystery-“emerging” from the data (Thorne 2000).

Qualitative Data Analysis

- No formula, just guidance and direction, final destination is unique to each researcher.
- No abstract process of analysis, no matter how eloquently named or finely described can substitute for the skill, knowledge, experience, creativity, diligence, and work of the qualitative analyst (Stake 1995)
- Qualitative analysis and writing involve us not just making sense of the world but also making sense of our relationship to the world and therefore discovering things about some phenomenon of interest (Richardson 2000).
- Patton (2002) “Do your very best with your full intellect to fairly represent the data and communicate what the data can reveal given the purpose of the study”

Overwhelming?
What does all that mean?

Vaismoradi et al. (2013)

There is a considerable overlap among available qualitative approaches in terms of methods, procedures, and techniques. Such an overlap of epistemological, aesthetic, ethical, and procedural concerns can encourage a generic view of qualitative research, considering it a “family” approach in which **the similarities are more important than the differences, and where the notion of flexibility becomes an important value and quest**. However, there is another point of view, concerned with how such flexibility can lead to inconsistency and a lack of coherence (Holloway &Todres, 2003). It should not be forgotten that consumers of research assess the quality of evidence offered in a study by evaluating the conceptual and methodological decisions the researchers have made. Therefore, the researcher needs to make good decisions to produce evidence of the highest possible quality (Polit & Beck, 2003; Høye & Severinsson, 2007).

Types of Analysis- what method will you use?

Theoretically informed

Theoretically flexible

- **Phenomenology/IPA**
- **Ethnographic analysis**
- **Grounded theory analysis**
- **Content analysis**
- **Thematic analysis**
- **Framework analysis**

Think of a family… but consider theoretical underpinning!

Thematic analysis

Distinctions can be made between content and thematic analysis.

While content analysis is suitable for topics about which little is known, thematic analysis can provide a rich, detailed and complex account of the data (Vaismoradi et al., 2013).

The emphasis is more on themes and relationships and patterns between themes. It is a non linear analysis process with no peer checking.

https://www.psych.auckland.ac.nz/en/about/our-research/research-groups/thematic-analysis.html

Thematic analysis

Only provides method for analysis- does not prescribe methods of data collection, theoretical positions, epistemological or ontological frameworks- it is a method

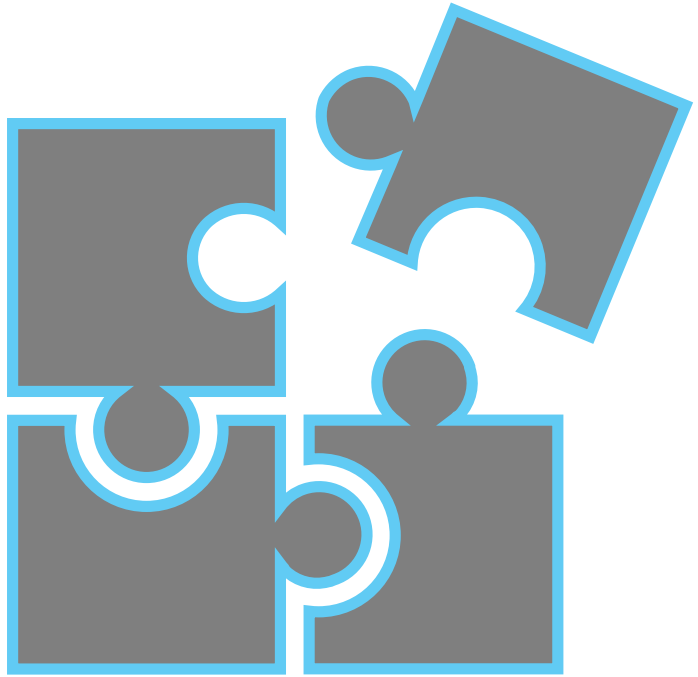
Strength is its flexibility

Can be limited in its interpretation if not used with a theoretical framework

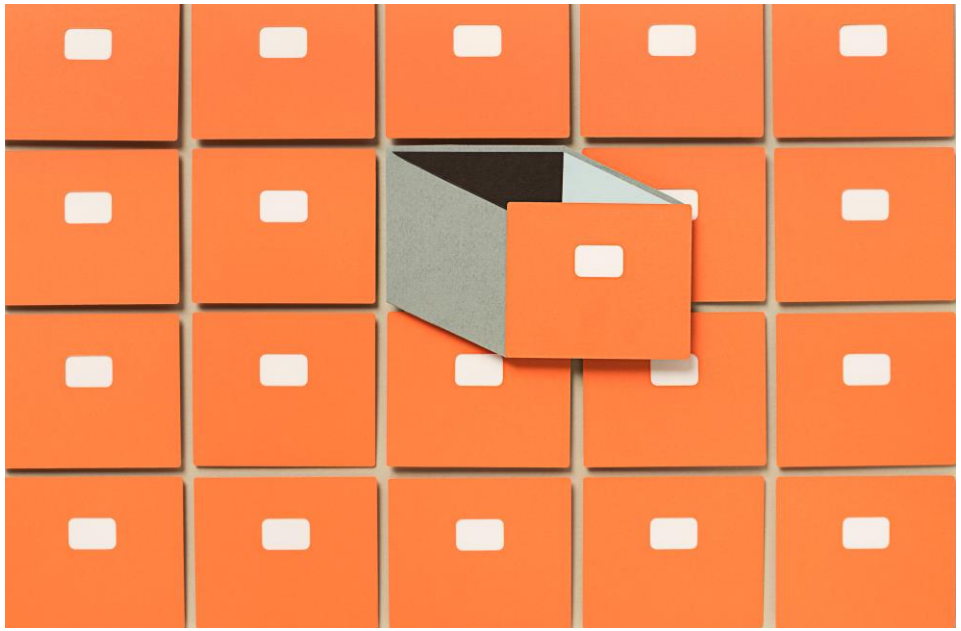
(Braun and Clarke 2013)

Types of Thematic analysis

- Coding reliability approaches
- Reflexive approaches
- Codebook approaches



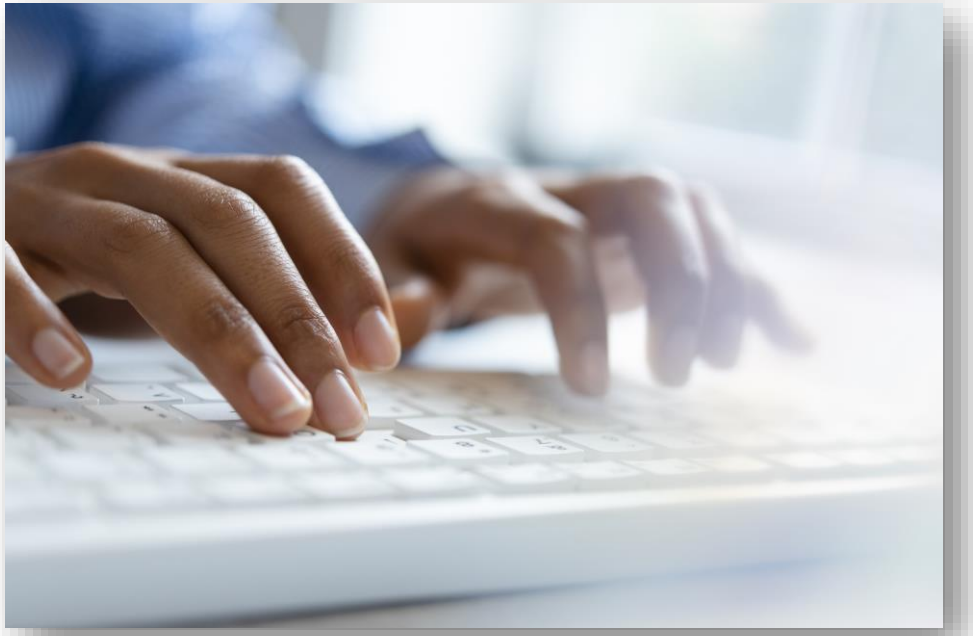
(Braun and Clarke 2020)



The practicalities

- Demographics/context
- Transcription
- Strategies for analysis
- Coding
- Data Management Software
- Focus Group interviews

Transcription



- Advantages/disadvantages of transcribing yourself?
- Confidentiality Agreement
- Important to identify who is speaking, overlaps in speaking, gaps, non-linguistic utterances, emphasis and so on (Polit and Beck 2012).

- Possible errors?

Example approach: Braun and Clarke (2006)

- Familiarising yourself with your data
- Generating initial codes
- Searching for themes
- Reviewing themes
- Defining and naming themes
- Producing the report

Analytical sensibility-not just following rules but going beyond the obvious in reading and interpreting (Braun and Clarke 2013)


THEMES
DO NOT
EMERGE!

Coding

Code: a descriptive or conceptual label that is assigned to excerpts of raw data in a process called coding (Gale et al 2013)

Develop into themes and categories (Lathlean 2010).

Can be *a priori* or emerge from the data (Lathlean 2010).

Can be researcher driven or data driven (Braun and Clarke 2013).

New categories may emerge which impacts on previously coded data so rereading may be necessary (Polit and Beck 2012).

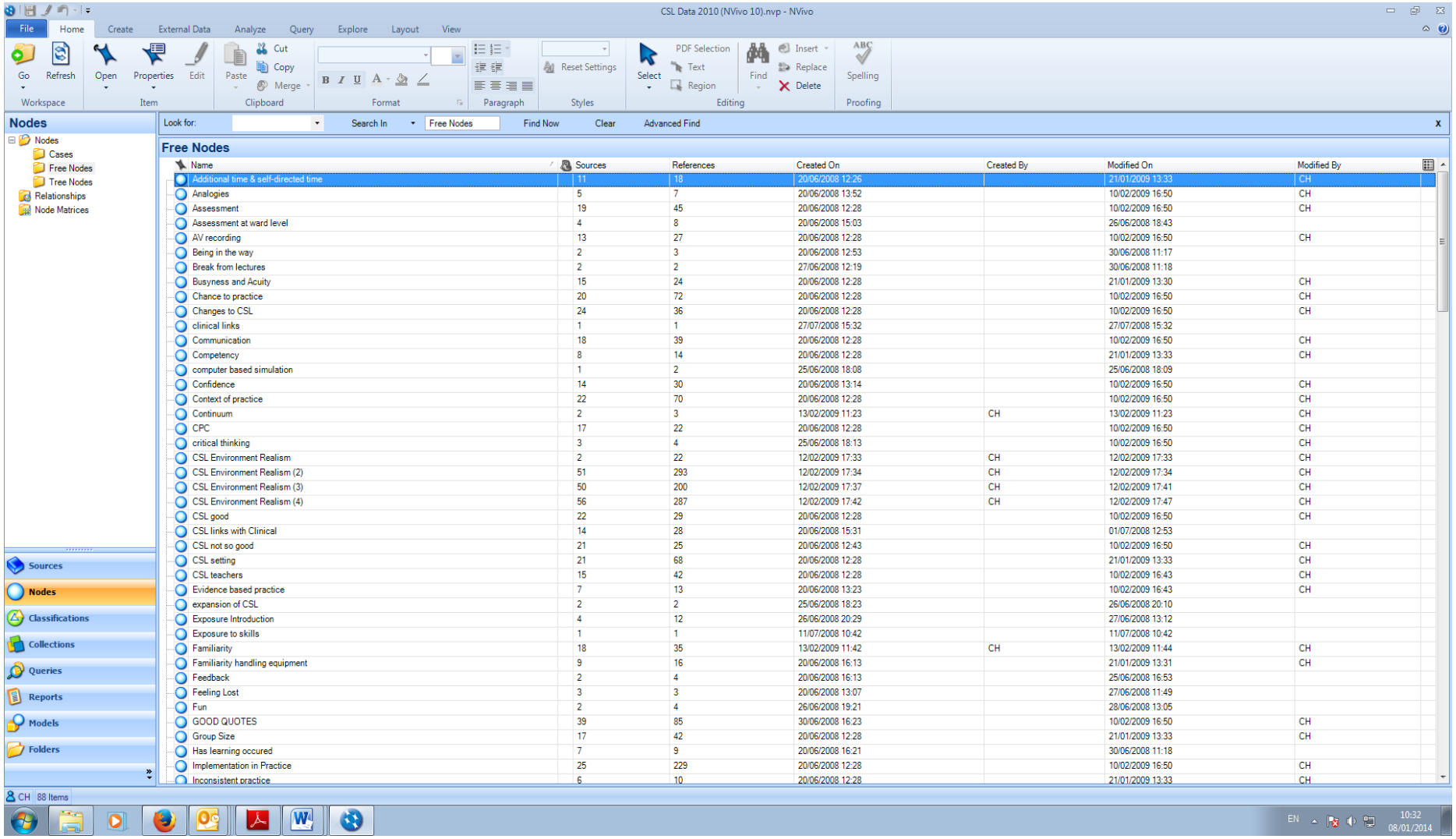
Theme: DeSantis and Ugarriza (2000) A theme captures and unifies the nature or basis of the experience into a meaningful whole.

Themes are structural meaning units of data (Streubert and Carpenter 2011)

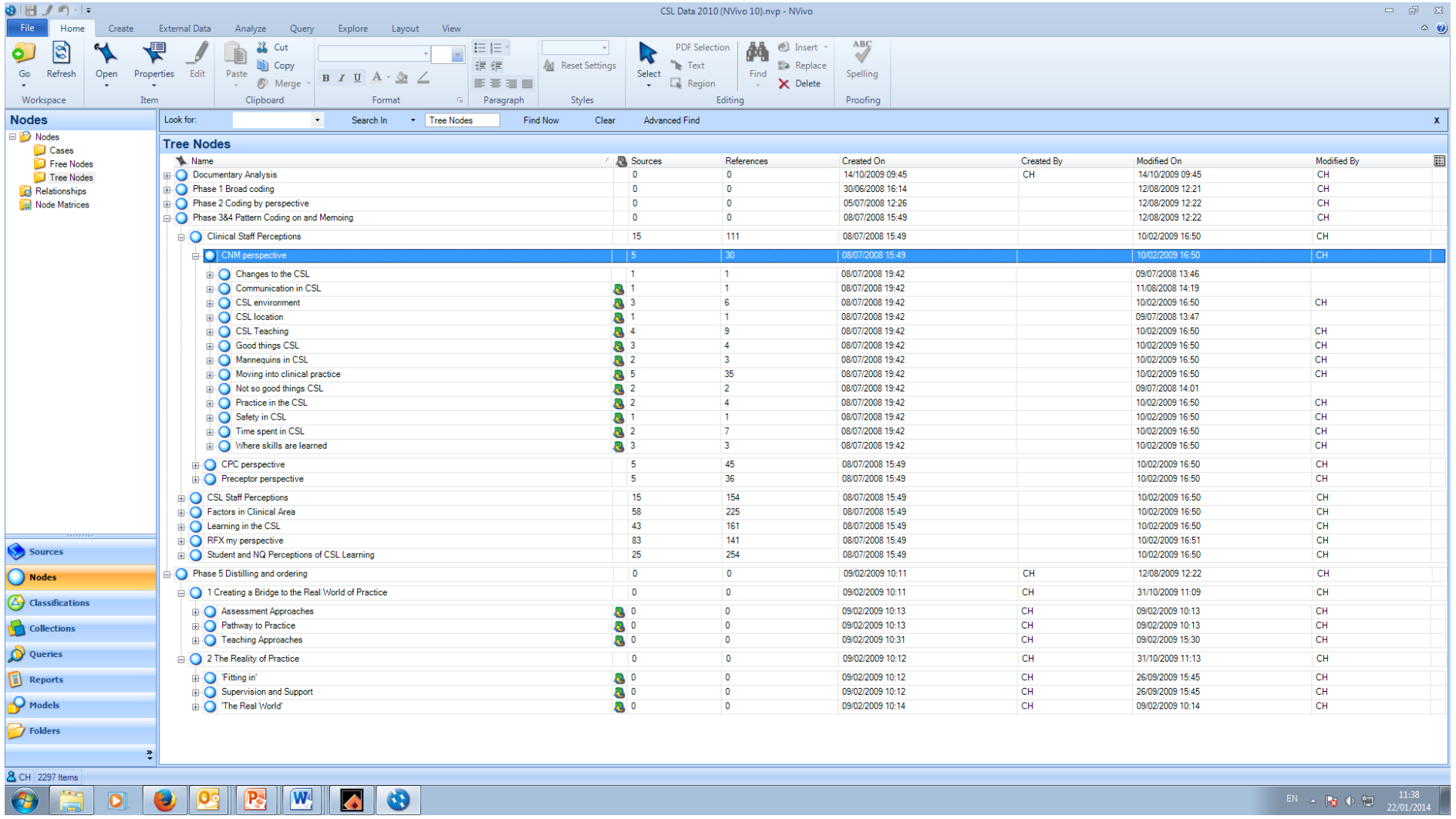
Commonalities and natural variation-of different perspectives useful.

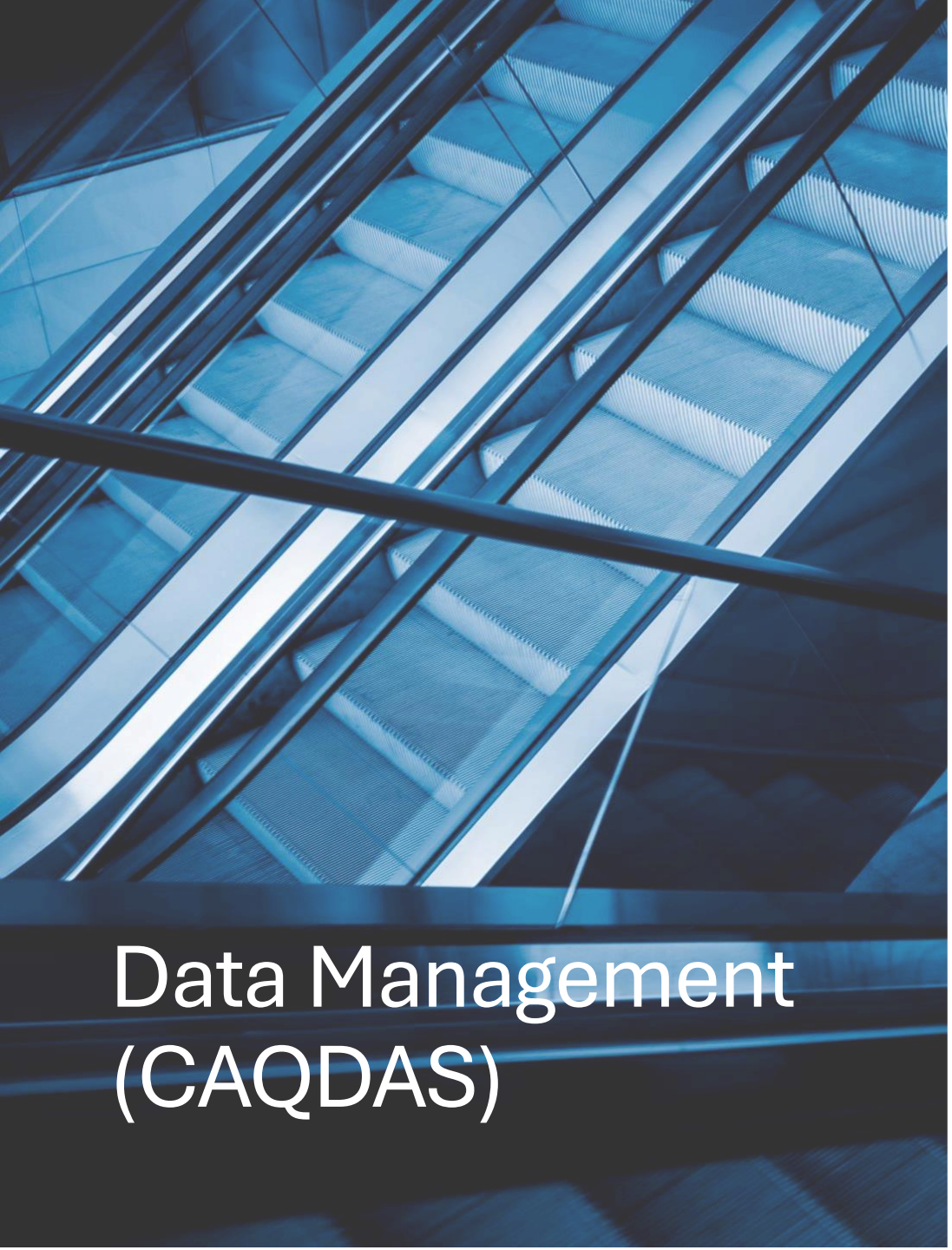
Metaphors (particularly in phenomenology) useful, e.g. “all in the same boat”

Pitfalls of coding



Manageable Coding cont.





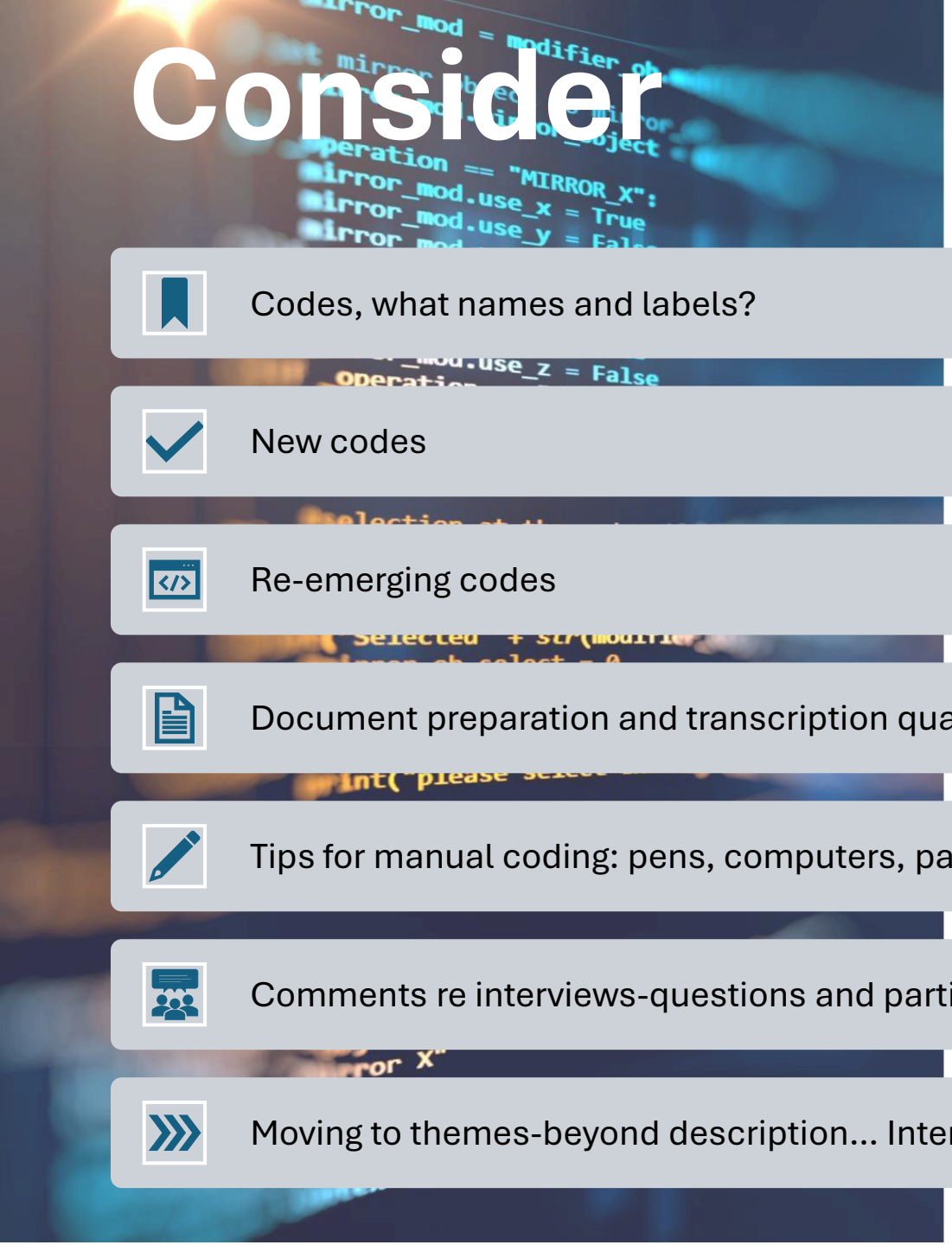
Data Management (CAQDAS)

- Developed to assist in the handling, storage and manipulation of the data
- Quick and easy retrieval of data and provides a comprehensive approach to management
- Software is incapable of understanding or giving meaning to text and cannot replace the analytical skills of the researcher
- CAQDAS can enhance transparency and rigour (Crowley *et al.*, 2002; Richards, 2002; Bringer *et al.*, 2004).
- Audit Trail
- Query tools

Practical Exercise

The impact of regular travel for people over 70

Consider



- Codes, what names and labels?
- New codes
- Re-emerging codes
- Document preparation and transcription quality
- Tips for manual coding: pens, computers, paper??
- Comments re interviews-questions and participant type
- Moving to themes-beyond description… Interpretation

Summary points

Good analysis is better than an aspirational methodology

Good questions, sampling and data collection will lead to better analysis

Pick an approach and adopt the language but processes are often similar (family)

Question, reflect, audit…

Coding is mechanical, developing themes through interpretation is soulful

Rigour is straightforward if your analysis is well managed

Additional Reflections

- Don’t jump ahead. When coding don’t interpret too soon.
- Think of weighting- Some, Many, Majority, A few..
- If it is only one person, why include it? deviant case?
- When writing up your findings, the quotes are for illustration and should not replace the text
- Read published examples for inspiration

Data Adequacy:

- Define data adequacy and explain its importance
- Recognise indicators that adequacy has been reached
- Understand the discourse between data adequacy and sample size in qualitative research

Firstly, what is data saturation?

- “the point in category development at which no new properties, dimensions, or relationships emerge during analysis” (Strauss & Corbin, 1990, p. 143).
- Rooted in Grounded Theory- first developed in the 1960s

Data collection			
Interview guide	17	Were questions, prompts, guides provided by the authors? Was it pilot tested?	
Repeat interviews	18	Were repeat inter views carried out? If yes, how many?	
Audio/visual recording	19	Did the research use audio or visual recording to collect the data?	
Field notes	20	Were field notes made during and/or after the inter view or focus group?	
Duration	21	What was the duration of the inter views or focus group?	
Data saturation	22	Was data saturation discussed?	
Transcripts returned	23	Were transcripts returned to participants for comment and/or	

Tong, A., Sainsbury, P. and Craig, J. (2007) 'Consolidated criteria for reporting qualitative research (COREQ): a 32-item checklist for interviews and focus groups', International Journal for Quality in Health Care, 19(6), pp. 349-357.

Why is this problematic?

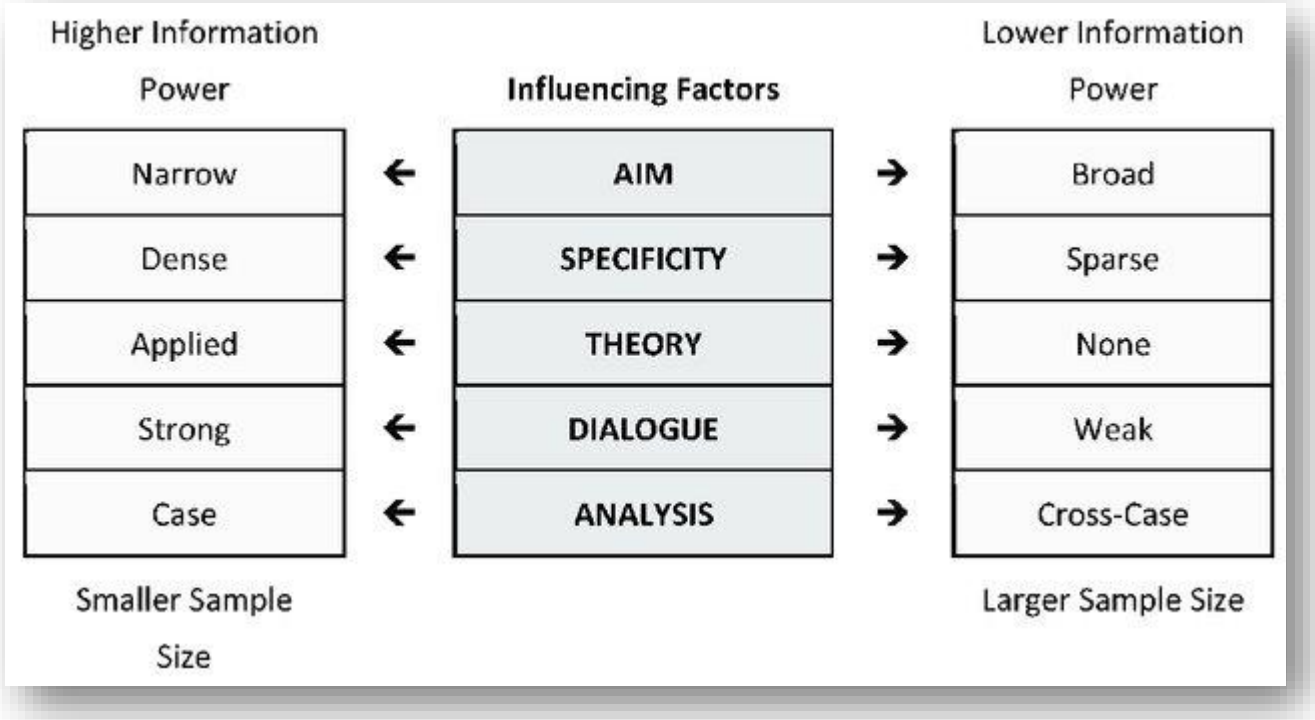
- Strives for redundancy rather than anomolies (Braun and Clarke 2019, Abdalla Mikhaeil and Robey 2024).
- Researchers claim saturation without demonstration of how (Aguboshim 2021, Abdalla Mikhaeil and Robey 2024).
- Smaller data sets in which a researcher is intensively engaged overtime can be more adequate than a larger data set withsuperficial engagement (Aldiabat and Le Navenec 2018; Onwuegbuzie and Leech 2007).

What do we mean by data adequacy?

- Abdalla Mikhaeil and Robey (2024) define data adequacy as "judgments about the richness and complexity of data and its capability to support inferential reasoning in relation to a specific research purpose" (p.4).
- Need to open minded to challenge assumptions of redundancy with disconfirming cases.
- Avoids justifications based on quantitative criteria, such as the number of interviews, the number of transcribed interview pages, or even the length of time spent as participant observer (Abdalla Mikhaeil and Robey 2024).
- Transparency and data adequacy are mutually reinforcing as they both contribute to the soundness and robustness of qualitative findings (Abdalla Mikhaeil and Robey 2024).

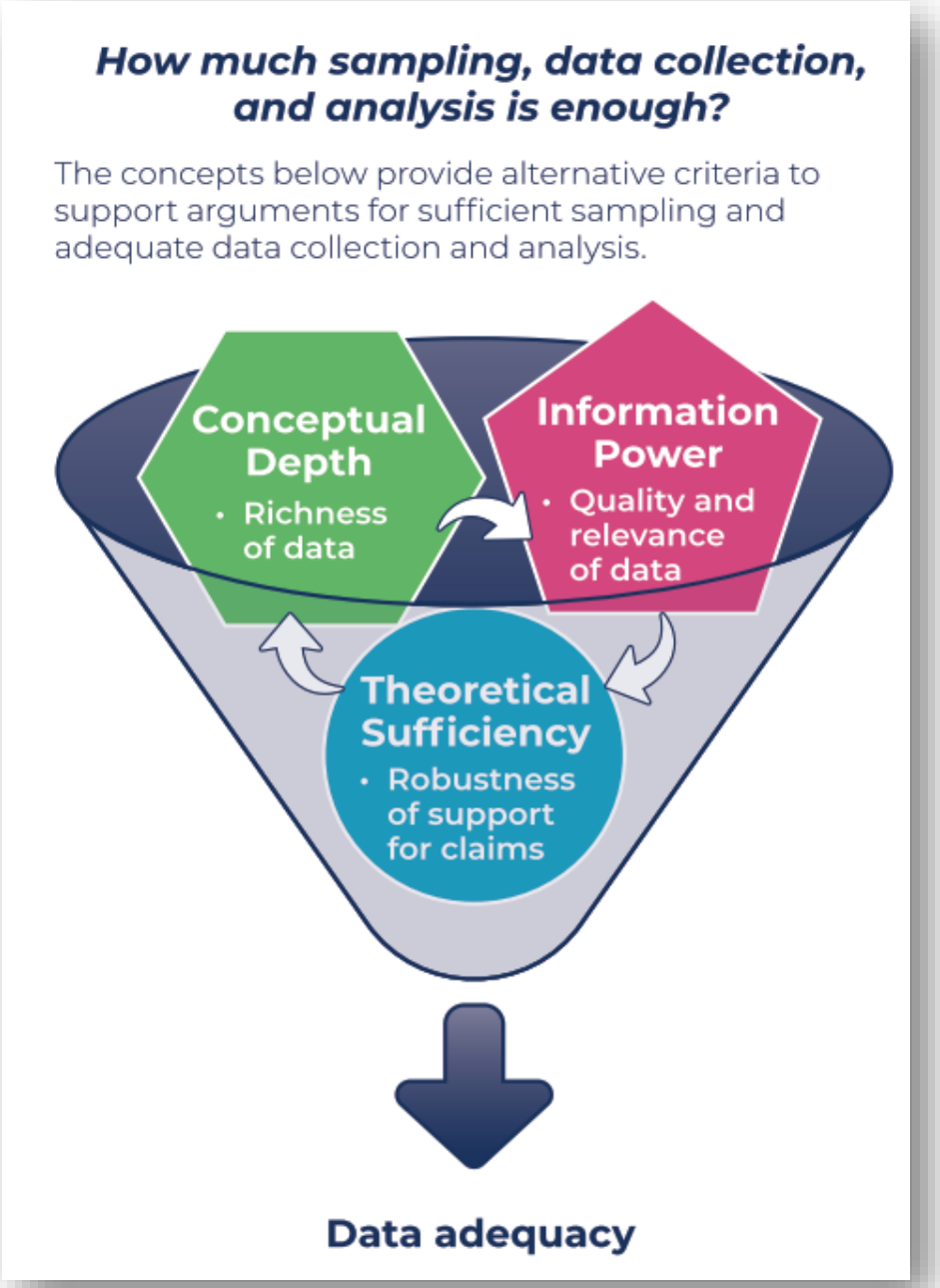
So, what can we do? Consider information power...

Malterud, K., Siersma, V. D. and Guassora, A. D. (2015) 'Sample Size in Qualitative Interview Studies: Guided by Information Power', Qualitative Health Research, 26(13), pp. 1753-1760.



… and conceptual depth and theoretical sufficiency!

Sims, D. and Cilliers, F. (2025) 'Assessing Data Adequacy in Qualitative Research Studies', Academic Medicine, 100(6), pp.758.



In conclusion...

- Data Saturation is arbitrary and often declared rather than executed
- It is okay not to know sample size in advance- an informed "guess" with iterative decisions throughout the study
- Use reporting guidelines with caution- and don't be afraid to justify decisions
- Consider richness, diversity of participants, expectations of participants (how much data can you collect), Breath of research aim, pragmatic concerns (funding, time etc.) (Braun and Clarke 2019)

Reporting Qualitative Research

resources.equator-network.org

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EQUATOR Network: what we do and how we are organised

The EQUATOR Network is an "umbrella" organisation that brings together researchers, medical journal editors, peer reviewers, developers of reporting guidelines, research funding bodies and other collaborators with mutual interest in improving the quality of research publications and of research itself.

We are developing into a global initiative covering all areas of health research and all nations, and actively involving all key stakeholders. We have launched the first five national centres that will substantially contribute to expanding EQUATOR activities: the UK EQUATOR Centre (also the EQUATOR Network's head office), French EQUATOR Centre, Canadian EQUATOR Centre, Australasian EQUATOR Centre, Chinese EQUATOR Centre and US EQUATOR Centre. The new centres will focus on national activities aimed at raising awareness and supporting adoption of good research reporting practices. They will work with partner organisations and initiatives and will also contribute to the work of the EQUATOR Network as a whole.

EQUATOR's mission and goals

The EQUATOR mission is to achieve accurate, complete, and transparent reporting of all health research studies to support research reproducibility and usefulness. Our work increases the value of health research and helps to minimise avoidable

Reporting guidelines for main study types

Randomised trials	CONSORT	Extensions
Observational studies	STROBE	Extensions
Systematic reviews	PRISMA	Extensions
Study protocols	SPIRIT	PRISMA-P
Diagnostic/prognostic studies	STARD	TRIPOD
Case reports	CARE	Extensions
Clinical practice guidelines	AGREE	RIGHT
Qualitative research	SRQR	COREQ
Animal pre-clinical		

Reporting guidelines for main study types

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Clinical practice guidelines	AGREE	RIGHT
Qualitative research	SRQR	COREQ
Animal pre-clinical studies	ARRIVE	
Quality improvement studies	SQUIRE	Extensions
Economic evaluations	CHEERS	Extensions

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Reporting guidelines for qualitative research: a values-based approach

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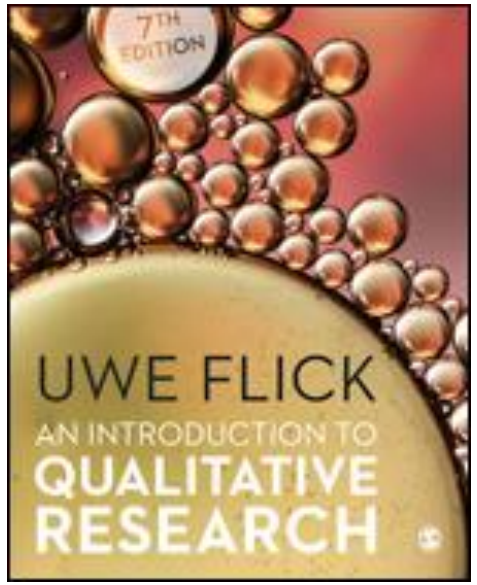
ABSTRACT

Evaluative tools for qualitative research need to be developed and designed in a way that allows them to be used by the research community to assess qualitative research on its own terms, and thus strengthen, rather than undermine, research quality. The diversity of qualitative research practice makes the development of 'one size fits all' tools challenging. When evaluating *Big Q Qualitative* – the use of practices for generating and analysing qualitative data underpinned by qualitative research values – many existing 'one size fits all' reporting checklists and standards have the potential to introduce methodological incongruence through their inclusion of criteria that don't 'fit' or align with Big Q values. The values and practices of Big Q Qualitative research, and the paradigms and meta-theoretical assumptions that inform them, are typically incommensurable with ideas and ideals founded in, disciplinary dominant, (post)positivism/objectivism and scientific realism. The unknowing, or knowing-but-required, application of ill-fitting criteria and standards for reporting risks not just incongruence, but undermining the vitality and creativity of Big Q Qualitative. However, evaluative guidelines remain important tools, pragmatically and rhetorically. In this paper, we explain and justify our development of a set of reporting *guidelines* to support methodologically congruent and reflexively open evaluation and reporting of Big Q Qualitative research. The *Big Q Qualitative Reporting Guidelines* (*BQQRG*) articulate a values-, rather than consensus-, based framework for reporting and evaluating qualitative research.

KEYWORDS

Big Q; BQQRG; methodological coherence; methodological congruence; methodological integrity; reflexive openness; small q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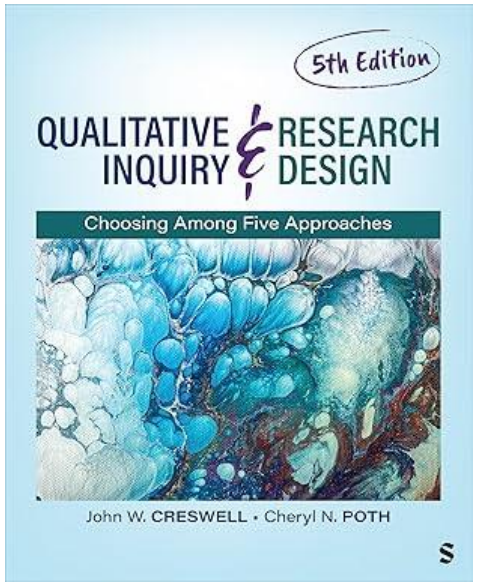
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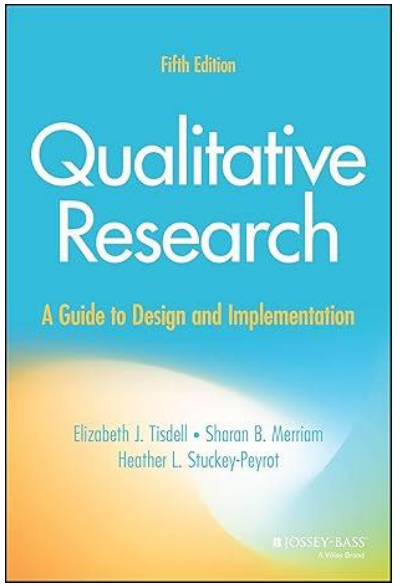
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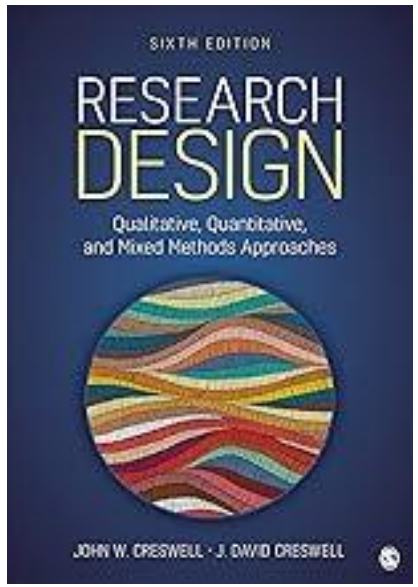
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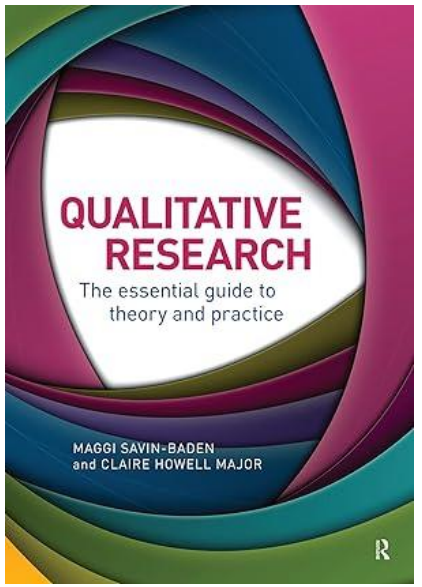
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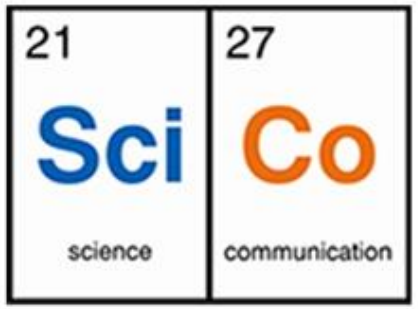
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