



Wellbeing Measurement
A Guide to **Qualitative** Data Collection

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About this resource

Over the last four years **Happy City** has accumulated knowledge and experience of wellbeing data collection and analysis through the design, development and piloting of pioneering wellbeing measurement tools the **Happiness Pulse**, **Happy City Index** and **WellWorth policy toolkit**.

Happy City has specifically focused on urban wellbeing in the development of a wellbeing measurement tool that could contribute to a city-wide model of progress. The Happy City Index measures key wellbeing factors that would be missed if the traditional measures of economic growth such as GDP, were used to estimate the benefit of interventions to society. The tool brings together a number of existing wellbeing measures to derive a holistic assessment of wellbeing that captures how people are feeling and functioning in their everyday lives. The survey instrument – the “Happiness Pulse” – was developed in partnership with the New Economics Foundation (NEF) with the dual aim of collecting citywide wellbeing data and engaging individuals and communities in the measurement and promotion of their own wellbeing. We explore details of the 2016 Happiness Pulse pilot in this guide.

The WellWorth policy toolkit, developed in partnership with the University of Exeter, is a digital tool that provides valuable information on the individual and societal benefits of wellbeing interventions. This innovative translation tool uses well-being data to influence local policy; a promising new approach to policy decision-making.

This guide shares our learning to help you, whether you're using Happy City products and services or not, to make better decisions about collecting wellbeing data and design more effective and reliable ways of making it reality.

Who can use it?

- Anyone wanting to collect wellbeing data within their organisation, small group or community
- Those wanting to get a snapshot of how individuals are doing right now within your group or organisation
- Those wanting to collect wellbeing data to evaluate a specific wellbeing intervention

This guide will help you to:

- Understand the ways in which you can collect qualitative wellbeing data
- Understand how qualitative data can compliment quantitative wellbeing data
- Feel more equipped to gather and analyse good quality wellbeing data

1.0 Wellbeing and researching it

1.1 What do we mean by wellbeing?

To talk about wellbeing we need to cover the concept of **subjective experience**; which is the idea that one person's experiences will be entirely from their own, single point of view. There can be no external frame of reference to compare two subjective experiences. For example, if one person reports they feel 55% sad and another says they also feel 55% sad, although both individuals offer us the same percentage we have no way of knowing whether each individual's 'sad' experience is exactly the same. The *subjective experience* of each individual is unknowable as we are unable to experience something exactly as someone else might.

The concept of wellbeing has been notoriously difficult to define for both individuals and researchers. Valid and reliable assessments of wellbeing rely on being clear about the specific 'thing' being measured and how the resulting data should be interpreted. Ultimately, wellbeing refers to how people are feeling and functioning in their everyday lives. 'Feeling' refers to emotions such as anxiety or happiness, and 'functioning' with things like feelings of connectedness to others or sense of competence. Generally people can evaluate their wellbeing using satisfaction scales or comparison to 'the best possible life' in the form of numerical or statistical data.

We can talk meaningfully about *dimensions* of wellbeing such as positive affect, low negative affect, sense of purpose and overall satisfaction with life, but a universal definition has yet to be established.

However, today it is generally agreed that **wellbeing is**:

- *Multidimensional*: incorporating all aspects of our lives essential for happiness e.g. social, physical, psychological
- *A positive concept*: considering both an absence of negative aspects of life and the presence of things needed to live a good life, e.g. healthy relationships, self esteem).

Importantly, **subjective wellbeing** is the more scientific term for **personal wellbeing**, which people often feel is a clearer, more accessible term (ONS, 2013).

Wellbeing and **happiness** are often used interchangeably. Although happiness is a central component of wellbeing, it refers to the emotional element of the experience: something we might feel moment-to-moment. The *feeling* of happiness, in contrast to having all the things that should theoretically make someone happy (e.g. money, good health) is the difference between **objective wellbeing** and **subjective wellbeing**. Objective being something that can (arguably) be measured externally, and subjective being something that only the individual can report on. **Resilience** is often linked with wellbeing and refers to our capacity to recover from difficulty. Whereas wellbeing varies in different contexts and between individuals, resilience is dynamic and can be 'built' to increase ability to cope with future stressful situations.

1.2 Why measure wellbeing?

- *Intrinsic value to individuals and society:* People readily identify with the kind of happiness and wellbeing that ties humanity together across cultures and time. Wellbeing depends on universal things like, the quality of our relationships, the health of the environment and strong communities filled with a sense of belonging and purpose. Wellbeing promotes balanced, resilient, supportive, far-sighted and caring behaviour.
- *A sustainable measure of progress:* Wellbeing is at the heart of what many organisations do and wellbeing interventions can take many forms. Being able to demonstrate the value of what you do with valid and reliable data can be instrumental in securing continued support for your work.
- *People powered decision making:* Understanding how people are feeling and functioning in your organisation provides meaningful data to inform decision making.

- *Wellbeing is the focus of a number of policies and projects at all levels – from international level actions including the Millennium Ecosystem Assessment which linked changes in environments to changes in human well-being to actions at a local level, with wellbeing facilitators being used by local doctors in an attempt to reduce burdens on health services.*

1.3 The challenges of collecting wellbeing data

Many organisations intuitively know that wellbeing is important or that what they do in their organisation might be good for wellbeing. Collecting wellbeing data can be tricky and for many organisations struggling with time and resources, wellbeing data-collection can often feel like a luxury.

Why is wellbeing not on the agenda?

- ➔ **Ambiguous definition-** As described above, wellbeing can be hard to define. This makes measuring it difficult and wellbeing data often gets a bad reputation for being 'wooly' and lacking punch.
- ➔ **Relatively intuitive findings-** Many people feel they have an intuitive grasp of what wellbeing is and what determines it. Wellbeing measurement tools in comparison are often quite crude, often providing limited information beyond what we would intuitively recognise to be true. For example, "*The wellbeing scores of unemployed people are on average much lower than that of employed people*". A lot of people might predict this kind of result, have an understanding of why this is and the many factors and nuances behind it. This can sometimes make measuring wellbeing feel redundant.
- ➔ **Rigour versus pragmatism-** Policy-makers, funding bodies and academics generally prioritise how 'rigorously' wellbeing data has been collected and analysed. Quality is crucial to conducting ethical social research as findings have implications both within the academic world and wider society. When making decisions based on data, people need to feel confident about the quality of evidence they are relying on. Understandably, this can put people off collecting wellbeing data if they don't feel it will be taken seriously. For frontline organisations with less time and resources to conduct highly controlled scientific research, there needs to be a balance between rigour and pragmatism. Collecting data that is 'good enough' may be better than not

collecting data at all. It is possible to collect good quality wellbeing data even with limited time and budgets.

- ➔ **Cost-** Some methods of wellbeing data collection are more costly than others in terms of time, people and money. This guide can help you choose the most feasible data collection methods for the scale of your project and the research questions you want to answer.
- ➔ **Resources and know-how-** Wellbeing is still a relatively new concept for many people, and there may be misconceptions about what it actually takes to collect and analyse wellbeing data. As well as tips covered in this guide, there is a huge range of open-source support for conducting social research available on the internet (See **list of useful links**).
- ➔ **Engagement-** Wellbeing measurement has traditionally been thought of as an extractive process- it's a bit tiring and sometimes painfully slow! With increasingly available technology we are learning more about how we can engage people with their own wellbeing measurement as something of value whilst motivating people to collect good quality data. Throughout this guide and our accompanying qualitative data-collection guide (**here**), we discuss how different methods of data-collection present opportunities to engage people with the wellbeing measurement process.

2.0 Getting started: things to consider

2.1 Validity and reliability

Data is information, and it is only meaningful to the extent that it is both valid and reliable. If you want to collect wellbeing data you need to be thinking about the validity and reliability of the information you are collecting **before** you start.

Once you have analysed your data, the extent to which you can conclude anything meaningful from your findings will depend on the validity and reliability of: your wellbeing measures, the sample you have used and your method of data collection. Of course, you may not be able to tick all the boxes and most research will be a compromise between scientific rigour and pragmatism depending on the organisation carrying it out. However, if you understand the validity and reliability limitations of the data you have you can make conclusions that accurately reflect your data and communicate your findings honestly.

Reliability

- The degree to which a measurement tool provides consistent and reliable results- the 'repeatability' factor
- Reliability may be across time or across measurement tools that measure the same thing (like wellbeing)
- If more than one person is observing the same behaviour, all members should agree on what is being recorded to ensure reliable results
- If two alternate measures claim to measure the same thing- e.g. wellbeing, you would assume similar results for the same person taking two different tests
- To be reliable, results at two timepoints from the same measure should be very similar if not the same
- Importantly, measuring reliability depends on the thing you are trying to measure. For example, intelligence is considered to be a relatively stable trait across time, so if the same person took the same test several months apart you would expect the result to be about the same. However, self-esteem or wellbeing can fluctuate much more often. Therefore, you might only expect the same result if given twice to the same person in a short time period.

Validity

- ❖ Refers to how well your research measures what it *intends* to measure

- ❖ Is about the credibility and believability of your findings: are the findings genuine?
- **Internal validity:** the instruments or procedures of a study measure what they intended to measure. Does your wellbeing survey ask questions that are relevant to wellbeing? For example, you might not ask questions about how many bars of chocolate people eat during the week to determine their wellbeing. Although for some, chocolate may offer some positive feelings, it has not been scientifically proven as a key factor essential for wellbeing unlike 'sense of purpose' or 'connectedness to others'. The links between chocolate consumption and wellbeing is an example of the complex relationship wellbeing can have with lots of variables. A relationship (or correlation) between two things does not imply cause and effect. In fact, the brand of chocolate bar, overall diet, activity levels and enjoyment of chocolate could be the key factors affecting wellbeing. For example, in the long-term, eating large amounts of brightly coloured sugar-coated chocolates could have negative health consequences that reduce wellbeing.
- **External validity-** how well the results can be generalised beyond the study to other people and other situations. For example, if an organisation asked their staff members to provide their personal scores from a wellbeing survey with questions relating to 'happiness in the workplace' the results would not have high external validity. This is because their results are probably going to be influenced by the fact that they have to show the boss their scores! If the situation was different, and their scores were anonymous they might complete the survey more honestly.
 - **Population Validity-** (a type of external validity) The extent to which the findings can be extrapolated to the wider sample or population you are investigating. Does the sample represent the wider population? Are the sampling methods appropriate? Random selection is the most experimentally sound way to recruit participants and assign them to groups.
- **Social desirability bias-** as in the example above, this can occur when people complete surveys in a way that would be viewed 'favourably' by others: either over or under-reporting. It is important to keep this in mind when carrying out surveys, to ensure your data is valid.

- **Statistical conclusion validity**- The extent to which conclusions made about relationships between variables are reasonable. This is affected by sample size and internal validity.
 - For example, it may be that there is an effect of X intervention but you didn't find it because your measures were not reliable or your sample wasn't big enough i.e. you didn't have enough *statistical power*.
 - Conversely, you could conclude a significant effect of X intervention which probability-wise may have been a fluke! Statistical significance levels are important here, which in psychology often assume a 0.05 level of significance. In other words, for every time you run a statistical analysis you would expect the result to happen by chance 5 times out of every 100 statistical tests. Therefore the more independent statistical tests you do the more likely it is you will eventually turn up something significant. Playing with the data and 'phishing' for results by doing many independent tests will affect the statistical conclusion validity of your results and should be adjusted for.

Relationship between reliability and validity

For data to be valid it must also be reliable, for example, if people received a wildly different score on an intelligence test every time they took it, the test is unlikely to be able to predict anything and is therefore would have no **internal validity**.

However if a test is reliable it **does not** mean it's valid. For example, a simple measure of heart rate (beats per minute) might be very reliable physical measurement, but it does not necessarily mean it is a valid predictor of wellbeing. To be valid there has to be evidence that it measures what you want it to.

2.2 Ethics considerations

In any research there are ethical considerations to bear in mind and data should be collected responsibly. Good research depends on mutual trust and respect between investigators and participants, maximising benefits and minimising harm.

Wellbeing data collection can be considered a form of social research or enquiry and appropriate ethical guidelines should be consulted. There are several bodies who have published guidelines for good practice, namely the

BPS (British Psychological Society), and SRA (Social Research Association). You can find their documents [here](#).

The main principles of ethical research centre around: protecting participants from harm, ensuring good standards of scientific methods of data collection and analysis and fair interpretation of and dissemination of findings.

Risk of harm

- In all social research, the risk of harm to individuals, groups and wider society should always be considered in the design of data collection methods, analysis and reporting.
- Although the motivation and agenda to collect wellbeing data will differ wildly between projects, it is the responsibility of the researcher to consider the consequences of research no matter how small the project.
- There is no absolute formula to predict the likely risk of social enquiry but researchers should consider all potential risks. Researchers are responsible for respecting and protecting the rights, dignity, privacy and self-determination of all participants.

Informed consent and right to withdraw

- Participants should be fully informed of the processes of data collection, analysis and reporting and their involvement should be fully voluntary.
- They should be made aware that they can withdraw at any time and that withdrawal would not affect them adversely in any way.
- Participants should be given opportunity to understand what they are being asked to do and have ample time to give their informed consent. It is good practice to provide written information sheets and consent forms.

Inclusion

- No group or individual should be disadvantaged from being consistently missed out or under-represented.
- Good quality research depends on gathering reliable and valid data that represents the people affected by the findings.

Data protection

- All identifiable data should be collected, stored and destroyed in line with data protection legislation. See data protection legislation [here](#).
- Participants should be made aware of how their data is stored, whether it will be held and analysed anonymously or just confidentially. They should also be made aware of how the data is going to be used and reported.

Confidentiality

- Participants should have confirmation that personal information will remain confidential. This is especially relevant in qualitative research where sensitive and personal topics are discussed in depth.
- Participants should be confident that their data will remain confidential, as any doubts about this could bias the responses they give.

Conflict of interest and objectivity

- If you are collecting data within an organisation that both yourself and your participants belong to, your dual-role may create a conflict of interest. All information can be misunderstood or misused and the potential harm to individuals or groups by obtaining data and reporting findings should always be considered and mitigated as much as possible.
- For example, findings reported from a small wellbeing study within a workplace may mean certain groups are stereotyped for having particularly 'low wellbeing' and decisions made on the basis of this may mean that people given preferential treatment over other employees as a result. Be responsible when reporting the limitations of your findings, acknowledging any shortfalls in data collection or analysis.
- It is important to be as transparent as you can about the motivations and objectives for data collection and remain impartial as much as possible. Although no research can be completely objective, researchers should pursue objectivity wherever possible. This means being honest about your own opinions and agendas for conducting research and your subjective interpretations of the data.
- Your participants may make assumptions about the reasons for data collection if you do not make this clear. Consequently, the data you collect may not be reliable if your participants feel they need to respond favourably towards you or your organisation or if they feel they are being personally evaluated. (See also: **Social Desirability and Collecting data strategically**).

- Participants should be made aware of how they may benefit from the research findings, and any conflicts of interest should be discussed before data collection.

2.3 What do you want to find out?

Choosing a research question

Your research question refers to what you want to find out, and is the driving force of your whole research project. It guides your method of data collection, analysis and interpretation of the results.

The question should be:

- Clear
- Something you (and/or your organisation) are interested in
- Be appropriate for the topic
- Sensitive to relevant research in this area

Filling in the boxes below should help you generate an appropriate research question:

What do you want to find out?	Answer
<p>Identify a broad area for investigation</p> <p><i>e.g. Wellbeing. This is the general area, but cannot be the whole driving force for the research. Once you have a general topic e.g. 'the impact of monthly social events on staff wellbeing', you can get more specific.</i></p>	
<p>What has already been done in this area?</p> <p><i>Get familiar with wellbeing</i></p>	

<p><i>measurement e.g. ONS wellbeing survey, Happiness Pulse, qualitative interviews that allow to you explore wellbeing in the workplace.</i></p>	
<p>Narrow down your topic:</p> <p>Ask yourself some open-questions like how, how much, why? Think about the factors that might contribute to the topic and what you are interested in. It needs to be a question!</p> <p><i>e.g. How is the wellbeing of my employees affected by social-contact at lunchtime?</i></p>	
<p>What sort of data do you want?</p> <p><i>Are you interested in breadth of information (quantitative) or do you want depth (qualitative)?</i></p> <p><i>Are you looking for numbers or stories?</i></p>	
<p>Is it possible to get the data you want? Can you measure it the way you want to?</p> <p><i>e.g. How will you 'measure' wellbeing? Are you interested in comparing wellbeing scores or getting insight into how individual's experience wellbeing? How will you measure social contact? What tools will you use? What tools have other people used? Is your</i></p>	

<i>preferred method reliable/valid?</i>	
<p>Is it feasible to get the information you want?</p> <p><i>I.e. Do you have the resources, time and expertise to carry out the research?</i></p>	
<p>Will the research produce data that can be supported or contradicted?</p> <p><i>I.e. It is possible to compare the data to other data sets? Does it relate to a scientific theory? Are you interested in a universal reality or the unique perspective of individuals?</i></p>	
<p>Is the question too broad/too narrow?</p> <p><i>I.e. Is it too difficult to answer the question? Is it vague or too general?</i></p>	

Now you have some ideas about the research question you want to answer, you may have a better idea of whether you would like to collect quantitative or qualitative data (or even both!). For more information of methods of quantitative data collection see **this guide**.

2.4 What kind of data will answer your research question?

What is qualitative data?

- Typically descriptive data
- Often more difficult to analyse than quantitative data
- Concerned with understanding behaviour from the individual's perspective
- Assumes a more dynamic state of reality
- Offers depth of information
- Often unable to generalise findings beyond individuals who provided the data

What is quantitative data?

- Information that can be expressed statistically or in numerical form
- Assumes a fixed and measurable reality
- Concerned with discovering facts about certain social phenomena
- Can offer breadth of information
- Can broadly generalise findings to similar groups
- Limited in depth and detail

There is generally a breadth versus depth trade-off between quantitative and qualitative data and the extent to which you are able to generalise your findings.

To illustrate this point consider the following example:

- *Wellbeing intervention*: a group of volunteers have created an allotment in your community that allows people to plant and pick vegetables.
- *The volunteers want to find out*: gender differences of those people in the community that used the allotment and those that didn't.

Qualitative or Quantitative?

- ➔ A *quantitative* wellbeing questionnaire completed by all members of the community would give you broadly representative data about the different groups that used the allotment (or not) and a general understanding of gender differences amongst respondents e.g. 35% women, 65% men used the allotment in the first week. You could generalise these findings to the local

community providing you had a representative sample. However, these responses would probably provide superficial or limited data on gender differences at best.

- Conducting smaller focus groups (a *qualitative* technique similar to a group interview) within the community, possibly breaking groups up according to gender or allotment-use, offers a much richer source of data on the role of gender in people's choice to use the allotment. For example, you could discover that some women didn't use the allotment because: they don't enjoy planting vegetables, they already visit an allotment outside the city, or because they would rather visit the local park in their spare time. However, these more detailed responses would be less representative of the wider community and may only be relevant for participants of the focus groups.

Why gather qualitative data?

Numerical and statistical data can be very useful but people's stories can be equally important.

- **Its complementary:** Qualitative data can both challenge and compliment quantitative data sets by providing a narrative for the numbers. It is generally easier for people to identify with, and understand people's stories which provide real-life context for averages and percentages. 'Zooming-in' to case studies can validate quantitative data, by showing your results are based in the experiences of individuals- supporting the conclusions you draw from the numbers.
- **It could be just what you need:** Many believe quantitative data is the most reliable and valid form of data due to the scientific framework behind it. However, gathering qualitative data may be the best way to answer your research question. It may not be possible to 'measure' the phenomenon you are interested in with numerical or statistical data.
- **Numbers can lie:** Although quantitative data can be very useful, without drilling down into the 'why' behind the 'what', quantitative data can be very misleading. Consider the following example:
 - *Wellbeing intervention:* a group of students are asked to download a mobile app to monitor their wellbeing. Three times a day, the mobile app asked them to complete short questionnaires about how they felt

and tick boxes about the activities they were doing (exercise, meeting friends etc).

- *Results:* Over the course of the week students wellbeing scores dropped lower and lower. The students general activity levels were also low. What could that mean?
 - What if the constant notifications from their mobile phones and particularly dull survey questions were having a negative impact on students' wellbeing?
 - What if, after seeing their wellbeing scores decrease, the students felt deflated and stopped doing things they enjoyed that week, like seeing friends or going to the gym?
 - Our interpretation of numbers is crucial- If you only looked at the numbers, you might make assume student wellbeing decreased because they weren't very active: not exercising, or because they hadn't done anything 'social' for a few days. Alternatively, you could link your findings with it being 'exam time' or Winter weather. While these factors might be important for wellbeing, the key reason student wellbeing decreased in the beginning was the boring and irritating mobile app you asked them to download! In this example, seeing wellbeing *scores* decrease also had a negative impact on the students which meant they changed their behaviour. This shows how the relationship between wellbeing scores and wellbeing measurement tools can be very complex.
 - Asking the students about their experience (gathering qualitative data) could uncover the true meaning behind the numbers.

Qualitative versus Quantitative

There are long-standing debates about the usefulness and validity of qualitative versus quantitative data. You should not be put-off by either type of data, as they can both be valid and reliable. The various opinions about 'what counts' as 'evidence' stem from the fundamental assumptions behind each approach.

Below we have provided an overview of some key facts. This is not a comprehensive review of the philosophical differences between qualitative and quantitative research, so if you wish to find out more please refer to our [**useful resources page**](#).

1. **Major differences:** In the vast academic field of qualitative research there are many important distinctions even between different qualitative methods.

However, the big differences between qualitative and quantitative research lie in these basic assumptions:

- *Nature of Reality*: Many qualitative researchers believe there is not a one, single 'reality', only our unique perspectives. In this case, you might limit focus to the unique experiences of individuals and would be reluctant to compare participants as a group. Many also count 'the researcher' in this, assuming they will bring their own biases to interpreting data (**see Reflexivity**).
 - *Theory of Knowledge*: There are many ways of 'knowing', which differs depending on your approach. As an example, many qualitative researchers believe the best way to understand a phenomenon is to look at it *within a context* i.e. they believe we can't make sense of something in isolation without respecting the wider circumstances. In this case, you might embed yourself within a given culture/context and adopt a flexible approach to data-collection, allowing the research questions to change as you learn more about the subject.
2. **One is not 'better' than the other**: There is good and bad qualitative and quantitative research but both data sources are valid and have value if done well. A focus on collecting *good quality data* should be the priority i.e. your method fits your research question, your data collection method is effective and you analyse and report your data in the right way. To get both breadth and depth from the data, we need to use both qualitative and quantitative methods of data collection.
 3. **Datasets are not entirely distinct**: Although many qualitative research methodologies don't require (or advise) assigning numerical values to qualitative data, it is possible to 'code' data numerically to gain further insights or explore a specific question. For example, you could count the amount of times a respondent spoke about the theme of 'wellbeing' in an interview, and compare it to other respondents. You could even do statistical analysis on this data, without changing the qualitative information held in it. The method of data collection, interpretation and judgment of responses is still very much *qualitative*. Although many would argue the two are completely separate, qualitative *data* itself can often be transformed into quantitative data, which offers interesting possibilities for data interpretation.

4. **All quantitative data (from humans) is based on a qualitative judgement:** We can't begin to interpret numbers just as they are, without some understanding of the assumptions and judgements behind them.

○ For example, take this 1-5 rating scale question:

How much do you agree/disagree with the following statement-

"Wellbeing is more important than having lots of money"

Strongly Disagree 1	2	3	4	Strongly Agree 5
<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>	<input type="radio"/>

This person indicated a response in the middle of 'Strongly Disagree' and 'Strongly Agree', would could that mean?

- Does a 3 mean that they agree slightly and disagree slightly? Or are they undecided? It could mean they think both 'wellbeing' and 'having lots of money' are equally important.
- Do they know what wellbeing means? What does it mean to them?
- What is 'lots of money'? How would they judge this?
- How 'strong' is 'Strongly'? This may mean different things to different people.
- 'More important' to who? Maybe the respondent thought the question related to their personal values, whereas some people may answer according to 'importance to society'.
- Because the statement is unclear, the respondent may have wanted to put their score somewhere in the middle, to indicate they did not know how to respond.
- How was the question shown in the context of the survey? There may have been other questions that influenced their response.
- Did the respondent read the statement properly? Or did they just complete the survey by randomly crossing boxes?

The important point being, there is no way to fully separate qualitative and quantitative data like this. Numbers and statistics are meaningless without us placing some qualitative value on them. During quantitative collection and analysis: the questions asked, the answers given, and how we make sense of those answers could be influenced by the assumptions and judgements of both the respondent and

researcher. Being aware of your personal interpretations is especially important when reporting on qualitative data, but as in this example, it can also be relevant when interpreting quantitative data.

2.5 Qualitative research questions

If qualitative data is the best source of information to answer your research question, you will be looking to get descriptive data from your participants or group members, probably in the form of text. Whether you are interviewing people or asking questions on paper, you have a lot of power to potentially influence participants' responses. To get good quality data that is valid and reliable, it helps to be aware of some common pitfalls of qualitative data-collection.

The table below illustrates some examples of questioning styles that could bias the data you get and how you might avoid these.

<p>Leading: <i>A lot of people have said the new wellbeing intervention is really good, do you agree?</i></p> <p>This is leading because you have framed the wellbeing intervention positively, which may influence the respondent to agree with you. 'Do you agree?' is not neutral and may be received as a prompt- which could give you unreliable data.</p>	<p>More neutral: <i>What do you think of the new wellbeing programme?</i></p> <p>This is a neutral question, allowing the respondent to answer without prompt. You are not trying to influence their answer positively or negatively, which is more likely to provide an unbiased response.</p>
<p>Closed-ended: <i>Did you take part in X wellbeing intervention?</i></p> <p>This only requires a yes or no response. It is closed, because it does not provide an opening for someone to describe anything. You might want to include some of these questions in a questionnaire or as a formality in an interview, but these questions do not generate qualitative data.</p>	<p>Open-ended: <i>What was your experience of X wellbeing intervention?</i></p> <p>This is a curious, exploratory questioning style which opens up room for description from the participant- a great strength of qualitative research. This is quite a general question, and you may wish to get more specific as an interview/qualitative questionnaire goes on. However, it is good practice to begin with more open questions, funneling into more specific ones.</p>

<p>Jargon/confusing: <i>How should collective subjective wellbeing impact on local policy making?</i></p> <p>The words 'collective' and 'subjective wellbeing' might be considered jargon-you would need to explain these first. 'Impact on local policy making' is vague and people might not identify with this description. Culture, context and wording can all get in the way. If a respondent doesn't understand the question, they are likely to give a biased response.</p>	<p>Jargon free/clearer: <i>What do you think about the wellbeing of people in Bristol affecting the decisions made by your local council?</i></p> <p>This question has more accessible terms, is neutral, clearer in what it's asking and defines 'local council' as an organisation a lot of people will identify with. You could then explore this issue further, with 'in what way?', 'how?'. <u>NB. 'Wellbeing', is still considered a jargon/ambiguous term by a lot of people.</u> It is important to define what you mean by wellbeing, using words and concepts your participants understand.</p>
<p>Too many questions: <i>How connected did you feel to your colleagues before and after the wellbeing intervention and do you think it had an impact on your relationships outside work?</i></p> <p>Asking several questions in one is likely to confuse your participant! You might miss valuable data without being clear about exactly what you want to know. The participant may answer one of the questions, none of them, or a mixed response based on all of them!</p>	<p>Breaks between questions:</p> <ol style="list-style-type: none"> 1. <i>How connected did you feel towards your colleagues before X intervention?</i> 2. Space for prompts (optional)- <i>Why? What was that like? Can you tell me more about that?</i> 3. <i>How connected did you feel towards your colleagues after X intervention?</i> 4. Space for prompts- <i>Why do you think that was? What was/wasn't different?</i> 5. etc... <p>Questions are clearly separated here. You might also want to allow time/space to explore participants responses with additional prompts to gain further insight into their experiences.</p>
<p>Needs quantitative data: <i>How does the wellbeing of my organisation compare to national averages?</i></p>	<p>See this guide for quantitative data-collection.</p>

To answer this question you will need to compare your organisation's wellbeing scores to national statistics (eg. ONS, SWEMWBS).

3.0 Qualitative data collection methods

3.1 Overview of methods

By nature, qualitative data is extremely varied in its form as it can be literally anything that cannot be captured by numbers or statistics. However, similar to when gathering quantitative data, this variability is not a problem if the method you are using suits your research question.

Some major categories of qualitative data collection are:

<p>In-depth interviews and focus groups</p> <p>These involve varying degrees of interaction from the interviewer which can impact on the data you are gathering. The objective is to explore a specific topic of interest with the interviewee(s). Exploration can be more targeted and specific or open and general. Data can be collected via: written notes, audio/video recordings and stenography.</p>	<p>Written documents</p> <p>This generally relates to documents that pre-date the research (as opposed to written data gathered in an interview) and could be in the form of newspapers, books, websites, transcripts of conversations, annual reports and diaries.</p>
<p>Direct observation</p> <p>This involves 'observing' individuals, groups or materials to gain an understanding of a particular phenomenon. There is no active engagement with participants here, and can include anything from field research observing a specific context or culture, to studying artifacts, video footage or</p>	<p>Action research</p> <p>A less conventional form of research which explores actions and research outcomes at the same time. It is a collaborative and solution-focused approach whereby the researcher and other(s) with an invested interest to resolve a problem, work together on a phased research project. Data-collection</p>

photographs that offer some insight into the area of interest. Similar to in-depth interviews data can be gathered via video/audio, pictures, drawings and written notes.

generally focuses on language rather than numbers is a cyclical process to critically evaluate the success of actions taken. This is an interactive process; all participants and the researcher are involved in the process of planning, acting, observing and reflecting. Responsiveness to emergent issues and flexibility in resolving them are key

Method	What's the focus?	Data	Sample size	Disadvantages	Advantages	What resources do I need?
Interviews	Individual experiences	Visual, audio, written text	Samples can be as small as one person	Time consuming, costly, interviewer has a lot more control to influence data collection and analysis	Can collect rich data about personal experiences, good method for sensitive topics, no influence from group members, uses participants own words	Interviewing skills, time to plan, conduct interviews and means to record them and analyse text data
Focus groups	Opinions and views of a group about a specific topic or experience	Visual, audio, written text	Generally 4+: No limit, but having a lot or very few people in a group may be problematic. A representative sample is important	Less control over research, sometimes difficult to disentangle the role of social context, can be difficult to organise and may not appeal to those who are less articulate/confident	Facilitates discussion: social interaction can encourage people to reveal thoughts, feelings and attitudes, good if interested in social context, uses participants own words	Ability to manage groups (role of moderator) is very important, space time to plan and conduct/analyse data
Observation	Observing people in their natural environment or culture (ethnography): recording what they do rather than what they say they do	Visual, audio, written text (can be overt or covert)	Depends on the context	Can be time-consuming, often seen as too subjective, data collection may be inconsistent depending on the day, if overt: can affect those observed, if covert: raises ethical questions	Allows study of situations and contexts where questionnaires/interviews would be impossible, good for understanding the role of context, can have high- validity for real-life situations	Time- you may need to observe for long periods of time to gather reliable data, space, recording equipment if videoing
Action Research	To solve a particular problem and improve practice in a particular environment: agree a change>research>reflection	Visual, audio, written text (can be quantitative/qualitative)	Those invested in the agenda to solve a problem	Difficult to disentangle 'action' and 'research', lack of repeatability and control from researcher, difficulty in implementing actions due to range of reasons not uncommon	Reflective and people are actively engaged in solving a problem, interactive and collaborative resolution between researcher and other(s), focuses on specific situations and context	Time and space to conduct and analyse: phases of implementing change>research>reflection can be lengthy

3.2 Interviews

Qualitative interviews are one of the broadest means of collecting qualitative data and can range from a few minutes to over an hour. Interviews rely on developing a good level of rapport with your participants and should aim to facilitate a natural interaction and flow of questions. For these reasons it is good practice to structure interviews in this general format:

1. Opening

- a. Introduce yourself, build trust and engage with participant
- b. Purpose: describe why you are doing the interview
- c. Motivation: what do you hope to achieve from the findings?
- d. Time-frame: how long will the interview take?
- e. Provide a space for participants to ask questions, and to consent to taking part
- f. Transition: I am now going to ask you some questions about....

2. Main body

- a. Begin with factual questions if possible e.g. How long have you worked here?
- b. Start with more open questions e.g. What did you think about the wellbeing intervention? NB. Ask about behaviours first if possible, moving on to feelings and attitudes later.
- c. Funnel into more specific questions e.g. Why did it make you feel that way?
- d. If you are conducting a nonscheduled interview you would leave room to adapt your interview questions as the interview unfolds.
- e. Transition into next topic (if necessary: We are now going to move on to some questions about...)
- f. Continue as above: beginning with factual questions if relevant and then funneling from open to more specific questions.
- g. Demographic questions should be left until the end- possibly in written format.

3. Closing

- a. Signal an end to the interview: you may want to briefly summarise what you have heard or recorded
- b. Thank the participant for their time and taking part
- c. Leave room for questions

- d. Discuss any follow up or data reporting that might be relevant to the participant

Further Tips for Qualitative Interviews

- ❑ **Funneling:** It is generally a good idea to start with broader questions, and funnel down into more specific ones.
- ❑ **Scheduled versus nonscheduled:** A scheduled interview involves a fixed set of questions that you will stick to. A non-scheduled interview provides flexibility to adapt the interview questions as you go. If you want to compare participants' responses to specific questions, it is important to ask them the SAME questions in the SAME order. Standardising the structure of the interview in a fixed schedule ensures (as best you can) that participants will have had a similar experience, and the results will not be unevenly influenced.
- ❑ **Explain your terms:** Make sure the participant understands the question, and be sure to explain words or phrases that are unclear. In many situations, researchers will ask the respondent to provide their own definition of a phenomenon.
- ❑ **Sensitive topics:** People vary in how comfortable they feel talking about personal things, so be tactful in your phrasing. The concept of wellbeing, is by nature very personal so be mindful of personal boundaries. Always ensure the participant knows that they don't have to answer the question if they don't want to.
- ❑ **Ask about behaviours first:** People generally find it easier to talk about what they do. Questions about their attitudes, values or feelings should come later if possible. For many people emotions, attitudes and values are ambiguous concepts, which may seem quite abstract. Using everyday language and providing examples can help.
- ❑ **Memory errors:** If you're asking questions about the past it can be hard for people to remember things accurately. This doesn't mean you should never do this, just be aware that some of the data may be unreliable if asking about events and feelings a long time ago.
- ❑ **How you come across:** If asking questions face to face, your facial expressions, vocal tone and body language can all affect how people answer

questions. Try to be neutral (but warm!) in your expressions, body language, tone and demeanour as much as you can to avoid biasing responses. Most importantly, do not offer your opinions.

- ❑ **Individual differences:** Other factors out of your control such as your age, gender, ethnicity etc, could also affect people’s responses. These personal factors are considered problematic from a strict scientific perspective, but are more accepted in qualitative research. However, it is good to be aware of how you as a researcher may influence the findings from your study; potentially discussing the limitations of qualitative data collection when reporting on your findings.

Example interview schedule
1. What have you done at the skills sharing sessions?
2. What have you taken away (if anything) from the skills-sharing sessions?
3. Do you do anything differently now as a result of the skills-sharing sessions?
4. How did you find the skills sessions? a) Likes/dislikes? b) Why?
5. What were the barriers or incentives for attending? a) Why? b) Is there anything that would help/helped this?
6. How have the sessions impacted on your wellbeing (if at all)? a) What has changed/stayed the same? b) Why do you think that is?
7. How did you find completing the wellbeing questionnaire? a) Was it helpful/unhelpful? b) How does it compare to this interview?
8. Would you like to add any further comments?

4.0 Analysing qualitative data

Analysing qualitative data can take a lot longer than quantitative data and brings its own unique challenges. Some factors to bear in mind are:

- ❖ **Sample size:** If you have 100 questionnaires with 5 questions-worth of descriptive text data this will take a long time to analyse. If you have few resources, be mindful of the scale of your study.
- ❖ **Time and resources:** Many types of qualitative analysis advise against too many people analysing data in the beginning. It can get confusing if lots of people are offering their interpretations at once. Once one/two people have carried out the primary analysis, you can then get your findings checked for credibility. Because of this, you should be realistic about timescales as it will be difficult to handover work without compromising the reliability of your analysis.
- ❖ **Transcribing:** To analyse your data you will probably need to get it into written format. If you have recorded interviews via audio/visual means only, it can take a very long time to transcribe this information.
- ❖ **Reflexivity:** This refers to the circular relationships between cause and effect i.e. a 'bidirectional relationship' means that two things are affecting each other, and neither can be given the label of 'causes' or 'effects'. You are generally much more involved in the process of qualitative research than quantitative research, so it's important to consider the bidirectional relationship between you and your findings. For example, it is considered good practice for researchers to keep journals throughout data collection and analysis to evaluate how their own thoughts, feelings and values are shaping the analysis. This might seem extreme and not essential for smaller scale projects, but you can still take time to think about reflexivity!

4.1 Methods of qualitative analysis

Depending on the method you are following there will be specific guidelines for how you should analyse your data. Some of the main approaches used in qualitative research are:

- *Thematic analysis*- a way of identifying, analysing and reporting on patterns or themes.
- *Discourse analysis*- a general term to describe analysing text, vocal content, conversation or any communicative event to explore meaning behind communication.
- *Grounded theory*- refers to the systematic creation of theories and concepts from systematic research.
- *Interpretive phenomenological analysis (IPA)*- explores how a particular person in a particular context makes sense of a particular phenomenon- their 'lived experience'.
- *Narrative analysis*- Focuses on how people use stories to make sense of the world.

The broadest and most commonly used approach to analysing qualitative data is thematic analysis. In the field of qualitative research there are many different ways to conduct thematic analysis, so if you are looking for a more indepth guide using a specific methodology you may find some useful links [here](#).

4.2 Thematic Analysis

Braun and Clarke (2006) define thematic analysis as:

"A method for identifying, analyzing and reporting patterns within data." (p. 79)

- This form of analysis succinctly organises and describes data in rich detail
- Thematic analysis (TA) is flexible, widely used and is more accessible than other more complex forms of qualitative analysis
- Is not tied to a specific theory: can be used with any theory the researcher chooses
- TA looks to identify patterns *across* participants' datasets, rather than within an individual dataset i.e. *What are the common themes amongst all the participants of X wellbeing intervention?*

CASE STUDY: Thematic Analysis

The following example provides some guidance for carrying out a basic level of thematic analysis on qualitative wellbeing data.

Wellbeing Intervention: You have introduced skills sharing sessions for your local community, whereby people who are unemployed meet up once a week to speak to each other

Method: Quantitative wellbeing survey and interviews

Quantitative data: Happiness Pulse data for 50 participants before and after intervention. See [here](#) for more information about the Happiness Pulse.

Quantitative research question: *Did the wellbeing intervention improve participants wellbeing scores?*

Qualitative data: Interviews of 10 participants of all age-groups: 5 whose wellbeing improved as a result of the intervention and 5 whose wellbeing did not improve/decreased. You have recorded the interviews with a voice recorder.

Qualitative research question: *Why did the skills sharing intervention improve/not improve wellbeing for these participants?*

Codes and Themes

Once you have all of the data in text format you can begin to uncover patterns in your data that answer your research question. There are a number of choices you need to make throughout this process which are outlined below.

When analysing your data you will look to identify 'codes' first, which can then be refocused into broader 'themes'.

- **Codes:** organising data into meaningful groups and picking out aspects of the data that are interesting to you in it's most basic form. You will be extracting meaningful information that is relevant to the research question. You can code data under a number of different titles. Some examples of code headings are: "Helpful relationships" or "Power dynamics in the group"

Tips:

- Code for as many potential themes as you can
- Collate all of the extracts that link with a specific code in separate documents

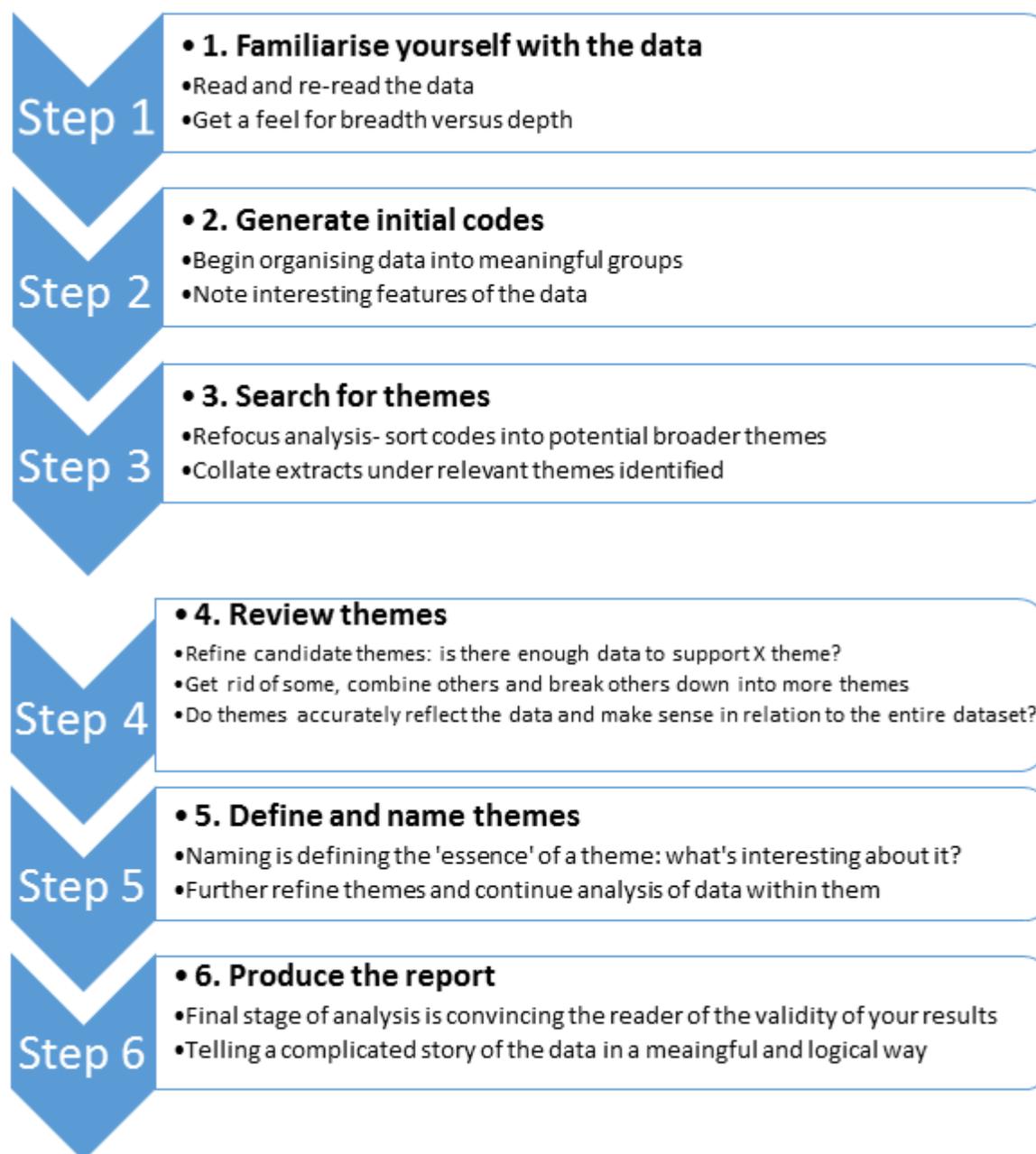
- **Themes:** This is the next stage of analysis. Once you have your codes you can start to identify broader themes that the codes fit within. Here you are interpreting the data to make sense of it in relation to your research question. You are trying to understand whether lots of different codes can be combined to make an overarching theme.

Tips:

- All extracts relating to a specific theme should tell a coherent story within a theme AND be meaningful as part of the story you tell about the whole data set i.e. you want the story to be meaningful both within themes and between them.
- Because you could define and redefine themes forever, ask yourself whether you are adding anything by changing themes that already work!

4.3 Stages of Thematic Analysis

Fig. Summary of Braun & Clarke's (2006) steps for thematic analysis



4.4 Identifying themes

Inductive versus theoretical thematic analysis

How you generate themes is linked to your overall research questions, and the distinction between inductive and theoretical analysis is important.

- *Inductive*: is a 'bottom up' process where themes are strongly linked to the data
- *Theoretical*: is more 'top down', whereby the analysis is driven by your interest in a particular research area, linking with other research or theories.

What counts as a theme?

When making decisions about grouping data into themes you need to decide how much weight you give to certain qualities such as vividness, prevalence and its relevance to the overall research question. Some key questions to consider are:

- Does this theme capture something crucial to the overall research question?
- How prevalent is this theme? (i.e. how common is it?)
- Although there is no right or wrong way to define prevalence, you can decide what 'prevalent' means for the purpose of your analysis: is it many/most/all?
- How strong is this theme? Are there any particularly vivid examples?
- Are there important differences within a theme that might represent sub-themes?

Exercise: Have a go at analysing this small group of interview extracts to see if you can first group the responses into codes and then identifying themes.

What codes might be generated from the following quotes?

- Participant 1 : *"Skills sharing sessions were good because I met some people in the same position as me"*
- Participant 2: *"I enjoyed the sessions because I realised that other people are going through the same things as me"*
- Participants 3: *"It was nice to hear that other people have found it difficult finding work at the moment"*

- Participant 4: *"I felt instantly at ease in the groups, knowing we were all in the same boat"*

Code suggestions:

These quotes are important to understand why some people's wellbeing increased as a result of the skills sharing intervention- i.e. our research question!

You might code these extracts separately as: 'feelings of ease', 'enjoyment of the sessions', 'knowing they were in the same boat', 'other people with similar experiences', 'people in the same position', 'nice to hear/listen to others', 'others going through the same things'. There are many ways you might code these extracts depending on the context of the wider data set and the lens through which the data is analysed.

What themes could be generated as a result of these codes?

Theme suggestions:

The extracts appear to show a similar experience amongst participants of the skills sharing intervention. There is something in people's experiences that unites them and makes sense.

You might find a meaningful theme amongst from the codes you generated such as *"Feeling of sameness and identifying with others"* , or *"Shared experience of being unemployed"*, or *"Sense of connectedness to others in 'the same boat'"*. These themes sound like they would be important to your research question in understanding why the wellbeing intervention was valuable to these participants.

You would then review and analyse these themes in more depth asking yourself: do these themes fit with the wider story of the data set? Are they an accurate reflection of people's words and meaning? What is the essence of this theme? How can I make sense of this pattern in relation to my research question?

How can I use themes alongside quantitative data?

It is good practice to collect both quantitative and qualitative data to gain both breadth and depth of information about wellbeing. See our quantitative guide [here](#) for more information.

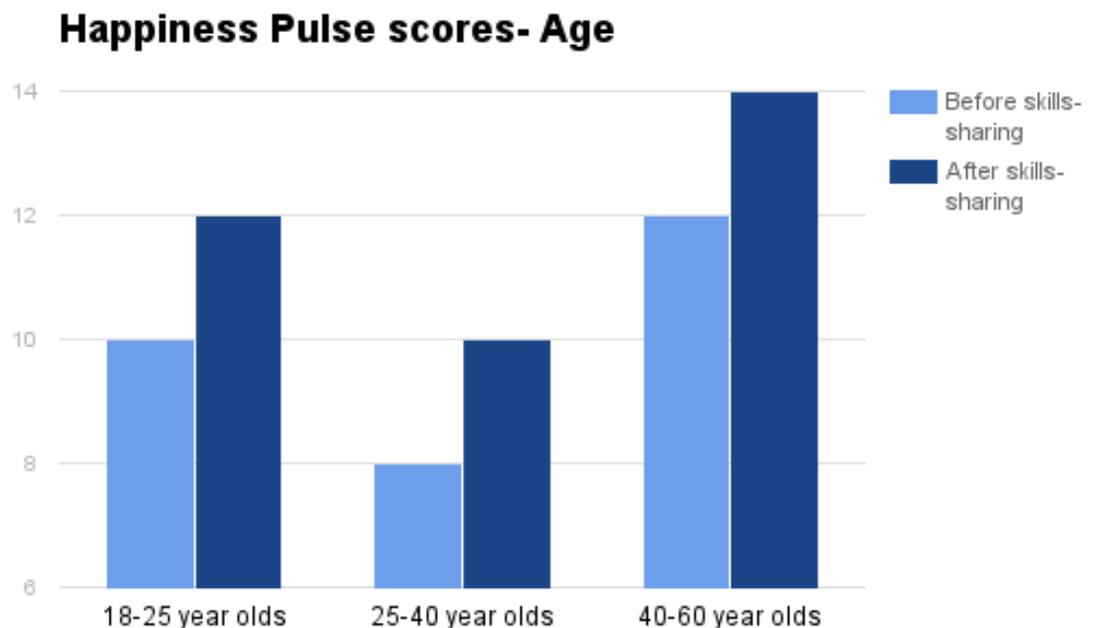
In the skills-sharing example above, we have also gathered **quantitative data**:

Happiness Pulse data for 50 participants before and after skills-sharing intervention.

The Happiness Pulse collects wellbeing data in several domains of wellbeing. Read more [here](#).

When analysing and reporting your findings, you might choose to display average wellbeing scores for your participants, or focus on specific demographics e.g. comparing men and women, or people of different ages. Qualitative data can complement the numbers by providing some depth of information to explain the findings.

Consider the following results:



Here you can see that for all of the different age groups, Happiness Pulse (wellbeing) scores increased after the skills-sharing intervention. Great news!

At a glance it might not be clear for which age group wellbeing increased the most. On closer inspection you can see that the average scores for the Happiness Pulse increased by **2** for ALL age groups, even if they did not all start off in the same place.

4.5 Drawing conclusions

So wellbeing increased...Why?

The qualitative data you gathered may provide some understanding of why people's wellbeing increased as a result of the skills-sharing intervention. You interviewed 5

people across all age-groups whose wellbeing increased as a result of the intervention and generated some potential theme ideas as a result.

Themes: *"Feeling of sameness and identifying with others" , or "Shared experience of being unemployed", or "Sense of connectedness to others in 'the same boat'".*

What you could conclude...

When considering the results of the intervention, you might conclude that although wellbeing scores between age-groups differed, wellbeing increased (**on average**) for participants in all age groups (by 2 points). Because you asked participants of all age-groups about their experience of the intervention you have some information as to why this was...

" On average wellbeing scores increased by 2 points for participants across all age groups. Qualitative interviews with 5 respondents whose wellbeing improved as a result of the intervention described that the skills sharing offered:

- 1. A sense of connectedness*
- 2. Feeling of sameness and identifying with others in the 'same boat'*
- 3. A shared experience of being unemployed*

Connectedness is proven to be important in wellbeing, which may explain why wellbeing increased as a result of the intervention. "

What you can't say...

You could not conclude that this was true for ALL participants. Although wellbeing increased **on average** for all age-groups, not *everyone* who took part in the skills-sharing intervention experienced increased wellbeing.

Remember: You also interviewed 5 respondents whose wellbeing did NOT increase as a result of the intervention. Generating themes from this qualitative data may provide some understanding as to why their wellbeing didn't increase.

Some themes you might draw out from interviews about participants' experience of skills-sharing could be: '*Unease within group dynamic*', '*Usefulness of skills not relevant*', and '*Sense of failure associated with being out of work*'. You can now report honestly on the data you have and offer some explanation as to why wellbeing did not increase for ALL participants...

" Importantly, wellbeing scores did not improve for 15% of people who took part in the skills-sharing intervention. Qualitative interviews with 5 respondents whose wellbeing did not improve highlighted some important issues that may have impacted negatively on their experience of the intervention:

- *Feeling uncomfortable in the group*
- *Not all participants felt the 'usefulness' of the skills shared were relevant to them*
- *A sense of failure associated with being unemployed*

This provides some valuable insight into why the skills-sharing intervention was effective for some participants and not for others."

A comprehensive report would outline and explain themes in more depth based on the analysis you have done, providing fair and honest conclusions. This example offers a basic illustration of how you might use qualitative data to make sense of the numbers and provide depth to your research. Collecting both broad quantitative wellbeing data, and asking about people's personal experiences is extremely useful when evaluating the effectiveness of an intervention in this way.

5.0 Widening the lens: Participatory action research

An alternative approach to developing your wellbeing research question is to begin a dialogue with your participants about what wellbeing means to them in terms of their goals and values. It is a collaborative and solution-focused approach whereby the researcher and other(s) with an invested interest to resolve a problem work together on a phased research project.

Participatory research is becoming increasingly popular as a method to investigate complex, context-specific and culturally-dependent factors that can affect wellbeing. By exploring and identifying local or communal conceptions of wellbeing you can create communally relevant indicators and measurement tools.

The ESRC research organisation Wellbeing in Developing Countries (WeD) provides a useful protocol for this type of qualitative enquiry in their work aiming to understand the meaning of subjective wellbeing in developing countries. They developed an innovative 3 phase strategy for participatory research:

1. *An exploratory phase*- aiming to identify elements important to subjective quality of life
2. *A review phase*- understanding the substantive and methodological findings of the first phase
3. *A fieldwork phase*- this resulted in a new measurement tool the WeD-QoL phase 3 instrument which collects data on people's happiness and satisfaction with life

Research can often begin with value laden terms, such as 'poverty' or 'wellbeing', which means the opportunity to understand and appreciate other's experiences on their own terms is lost. Asking people what wellbeing means to them and how they might define it acknowledges and contributes to the 'multi-dimensionality' of subjective wellbeing. In addition, if you are investigating what is important to wellbeing in a specific group or community you can learn a great deal about crucial contextual factors that impact wellbeing.

Conclusions

Qualitative data is a valuable source of information to help you understand the 'why' behind the 'what' in wellbeing. Whether it be asking people what wellbeing means to them or gaining a richer understanding of participants' lived experience of a specific wellbeing intervention; qualitative data can provide much insight to inform

evaluation of a wellbeing intervention or guide future strategy. Again, when collecting wellbeing data it is advisable to use both qualitative and quantitative methods to achieve both breadth and depth. See our Quantitative data collection guide [here](#).

This resource has outlined the benefits, limitations and practicalities of qualitative methods for collecting wellbeing data. This guide is not exhaustive, but aims to offer some basic guidance around good practice when collecting wellbeing data in this way and how you might use it to compliment quantitative datasets. The list of useful links are included as signposts to other resources and can hopefully provide further detail in your specific areas of interest.

If you have already collected wellbeing data and want to evaluate the wider impact and value of a wellbeing intervention in key policy areas, please see our digital measurement tool- the WellWorth policy toolkit. ([link](#))

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