This essay seeks to provide a working definition of qualitative research, to identify common qualitative methods and methodologies and consider some of the advantages and disadvantages of the qualitative approach through the frame of public health and health research studies.

“Qualitative research is the systematic inquiry into social phenomena in natural settings” (Teherani et al., 2015). “In qualitative research, the researcher is the main data collection instrument. The researcher examines why events occur, what happens, and what those events mean to the participants studied” (Bogdan and Biklen, 1997) (Strauss and Corbin, 1998). It adopts an inductive, iterative approach to explore social or human issues (Isaacs, 2014), fundamentally differing from the deductive, hypothesis testing process implicit in quantitative studies (Taylor, Bogdan and DeVault, 2016 P25). It seeks to “understand individuals’ experiences, lifeworld and ‘collective’ social meanings that underpin that lifeworld “ (McClean et al., 2020 p.87).

Qualitative research is rooted in anthropology and sociology, with data being gathered in natural, real-world settings rather than a laboratory. It is particularly useful to determine why people, groups or communities may make certain decisions or act in a certain way, focusing on cultures and what people feel, say, mean and do. (Taylor and Francis, 2013). Data is gathered by interacting, interviewing, and observing individuals or groups, documenting the data retrieved and identifying general statements and underlying themes in the narrative (Silva, 2008).

Quantitative research has a positivistic ontology, i.e., that there is a “real” world that can be measured, predicted, and explained. The epistemology of quantitative research usually attempts to be separate (double blind, impartial) to avoid bias and distortion.

In qualitative research, the relationship between interviewer and interviewee is seen as unavoidable and as being of interest. The ontological approach typically adopts a social constructivist thinking approach accepting that truth and reality have no absolute value but are situationally variable (Moses and Knutsen, 2019).

In quantitative studies the randomness of samples, statistical analysis, representative sample sizes and use of probability theory are key to the quality and confidence in results (Palinkas et al., 2015). In qualitative research, there are a number of sampling approaches, theoretical, purposeful, opportunity, snowball etc. The emphasis is on ensuring the quality and appropriateness of the study subjects and having enough data to generate meaningfulness and insight (Patton, 1990), rather than having a predetermined size, sampling continues until no new concepts emerge. This is commonly achieved using a purposeful sampling approach (Janice Morse, 1991).

Qualitative research seeks to be emic, i.e. convey the speakers voice in their language, and be on their turf (Kirk & Miller 1986). Quantitative research is good at answering “what” questions whilst qualitative research focusses on understanding the “why”, (Strack, Magill and McDonagh, 2004).

There are several commonly used qualitative research methodologies, including Action research, (partnership approach involving participants in the process), Ethnography (observation of and immersion in a culture), Grounded Theory (inductive gathering of evidence to develop a theory as the study progresses), Narrative/biographical (gathering diaries, stories and life experience), Phenomenology (looking for common meanings within groups) and Case Studies (Chen and Teherani, 2016).

Potential weaknesses with qualitative methods include difficulties in generalizability (Mays and Pope, 1995). The volume of data obtained can be challenging to analyse and interpret.(Kitto, Chesters and Grbich, 2008) and the qualitative process is very time consuming in terms of interviews, transcription and coding (Anderson, 2010)

In summary, quantitative research uses numbers, begins with a hypothesis, and can produce population wide generalizations. In contrast, well produced qualitative research uses words, is concerned with meanings, induces Hypotheses from data and uses case studies, is typically less generalizable. (Justesen and Mik-Meyer 2012:15-17, quoted by (Silverman, 2011)). Quantitative and Qualitative approaches are not mutually exclusive and are commonly used in mixed method studies allowing researchers to utilise the strengths of each approach in a complimentary manner (Johnson and Onwuegbuzie, 2004) .

The advantages and disadvantages of Qualitative methodologies/methods can be best illustrated by considering specific examples. Two studies have been selected, the first demonstrating the use of Constructivist Grounded Theory (CGT) and the second Phenomenology.

The study “Adapting Qualitative Methods during the COVID-19 Era: Factors to Consider for Successful Use of Online Photovoice” (Rania, Coppola and Pinna, 2021) aimed to consider the impacts remote participation may have on the qualitative process. A photovoice study was used to represent a typical qualitative approach. The photovoice study was themed "Living with COVID-19: practical and emotional aspects". 130 university students were recruited, and interaction was via MS Teams. This study was used to generate transcripts of individual and group reflections using the SHOWeD method (Wang, 2006). Analysis was via a reflectionist Constructivist Grounded Theory (CGT)approach.

Photovoice was a good match as a test of qualitative practices. It is relatively unobtrusive (Keller et al., 2008) and is ‘emic in nature, focussing on the participants voice, allowing dialogic analysis to bring out hidden meanings, to “show something specific or…send us a message”’ (Leavy, 2020) p569.

The visual nature of the process translates easily to small groups in a MS Teams environment. It could however be argued that student volunteers were likely to be familiar and comfortable interacting via computers / teams, and that the wider community may find this a more challenging environment.

Participants were divided into small groups led by a researcher (facilitator). As a subset of Participatory action research(PAR), photo can pass power to the participants (Baum, MacDougall and Smith, 2006). However, a common problem with PAR is that researchers may impose their own interpretations on the photos, privileging their own voice or focussed on dramatic images (Buetow, 2013) (Zurba, Tennent and Woodgate, 2017). The decision to use multiple small groups to identify photographs of relevance and meanings may have helped minimise this impact but poorly skilled facilitators could have compromised results (Rania, Coppola and Pinna, 2021), and poor management of group dynamics may have been detrimental to the research outcomes (Woodyatt, Finneran and Stephenson, 2016).

The transcripts were coded using CGT (Charmaz, 2014). CGT has a clear framework and approach (Hussein et al., 2014), functioning on the principle that theories and explanations develop directly from the analysis of the data, trying to avoid preconceptions (McClean et al., 2020). CGT is best suited to situations where no current theory is available (Creswell, 2017) but in this case many of the findings are already identified from existing literature raising a doubt if CGT was the most appropriate approach for the analysis.

The second paper was ‘The Lived Experience of COVID-19’ (‘The Lived Experience of COVID-19’, 2021):

This study aimed to identify the personal experience of persons who contracted covid early in the pandemic but were not hospitalised. It adopted a descriptive phenomenological approach, following the principles of Husser as opposed to the interpretive approach espoused by Heidegger (Watson, 2008). It used telephone based semi structured interviews (20 minutes to 1 hour), using open-ended questions to gather data. Transcription was via Colaizzi’s method for descriptive analysis (Colaizzi, 1978). Sampling continued until saturation of data was reached and themes were identified using the Lincoln and Guba approach (Lincoln and Guba, 1985).

Phenomenology follows a social constructivist philosophy and is a descriptive and interpretive methodology seeking to identify common meanings of lived experience and to provide an objective account of reality (Paley, 2017). (McClean et al., 2020 p100). The approach is popular in nursing and health services research, due to its focus on the meaning for patients with illness experience (Stott et al., 2018). “It is a powerful tool to understand the shared experiences of individuals” (Creswell, 2017) and “data analysis can follow procedural steps to develop wider themes, aiding in understanding”. (Moustakas, 1994)

Phenomenology appears a good match to this research question. The approach had several advantages, particularly early in the pandemic. They could purposively sample (Clifford, 1997), interviews could still take place by telephone, interviews were relatively inobtrusive and the use of one-to-one interviews rather than working in groups will have helped in avoiding stigma of having been infected. 1:2:1 interviews can generate a “productive relationship” and “thick description” of the phenomenon to help with understanding (Geertz, 2008) and seeks to draw on a group of people with shared experience (Creswell, 2017 P76). The use of Colaizzi’s method provided a rigorous, structured and transparent approach to analysis (Morrow, Rodriguez and King, 2015)

The descriptive phenomenological approach requires researchers to ‘bracket’ their own preconceptions and to focus on the participants experience and the difficulty in achieving this is a major criticism (Paley, 1997). The way that researchers identify “the meaning of phenomenon” is also often unclear (Paley, 2017) and the quality of the study relies heavily on the skills and ability of the interviewer (Polit and Beck, 2010).

Snowball sampling, relying on referrals between participants (Noy, 2008), was an interesting choice given the researchers concerns about the stigma of having covid. It may have resulted in a closely connected sample group, limiting the transferability of the findings. Furthermore, sampling should typically continue until saturation is achieved (Macnee and McCabe, 2008), quoted in (Mapp, 2008). This study refers to researchers “being immersed in the data until themes were illuminated” but it is not clear if saturation was achieved.

Qualitative research provides a powerful tool for Health/Public Health research, to fill significant gaps in the quantitative approach, specifically looking at the “why” question and puts human emotion and behaviour at the forefront of the research. There are several qualitative methodologies, but they have much in common and are all based on emic principles, seeking to amplify the voice of the researched and to provide a deeper insight into the reasons behind perceptions, decisions, and actions. Qualitative and quantitative studies should not be considered as opposed or mutually exclusive, they merely provide different tools to assess events and phenomena and can provide a richer, synergistic interpretation if used together. Indeed, the combined or mixed method approach is now one of the most common found in journals and published studies.

**Word Length 1647 words Max permitted = 1500 +/- 10% (1650)**

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1. **Is there a clear aim/research question(s) for the study?**   
     
   The aims of the study are clearly expounded, relating to the relationship between social identity and loneliness in older adults and are expressly stated as three questions. The study contains clear working definitions of loneliness and social participation and rationalises the need for the study in the context of established qualitative and quantitative studies demonstrating a link between loneliness and increased mortality, morbidity and other adverse outcomes. They further support this position by highlighting the health benefits of improving social participation in older adults, a conclusion supported by (The Stationary Office, 2012). They note that the links between identity and loneliness are not well understood, and consequently provide justification that the study is necessary to provide a valuable insight identifying poorly understood behavioural and motivational barriers to participation and engagement experienced older adults. (Greenhalgh and EBSCOhost, 2019 P31). The study also seeks to examine individual behavioural responses to these barriers and what, if any steps could be taken by groups, charities and organisations to improve the likelihood of engagement by lonely older adults.
2. **Is there congruity (i.e. an appropriate ‘fit’) between the aims/research questions and the research methodology and approach?**This study specifically looked to identify the participants own experience and perception of the barriers to social interaction, behavioural reactions to these barriers, to classify participants social identities and determine if identity contributed to any identified barriers. These questions relate to individuals experience, fears and motivations are a consequently a good fit for a qualitative study. (Barbour, 2008). Given the stated aims of the research, a qualitative methodology appears to be the best choice. It would not be possible to fully understand motivations, beliefs and feelings using a quantitative approach. (Choy, 2014).

The choice of research methodology should be guided by the research question (Silverman, 2011 P9). In this case, the selected approach appears to be constructivist grounded theory (CGT) based. This is not explicitly stated but is inferred from the approach to thematic analysis. There is no discussion of other methodologies or why CGT was considered appropriate as compared to, for example, understanding the nature and common experience of loneliness using an interpretive phenomenological approach (Van Manen, 1990). The decision to use an interview-based approach followed by thematic analysis may have simply been driven by pragmatism.

1. **Is there a specific recruitment and sampling/case selection strategy?**  
     
   The Recruitment process identified a “sample universe”, inclusion strategy and methodology for selecting cases (Luborsky and Rubinstein, 1995). It did not use the typical CGT theoretical sampling approach typical to CGT, where analysis of one set of data informs the selection of the next case. (Charmaz, 2014). Gatekeeper organisations were used to refer likely candidates, subsequently moderated by a researcher. Selection criteria were provided, but untrained recruiters may have effectively resulted in a form of convenience sampling (Stratton, 2021), resulting in poor research outcomes (Robinson, 2014). Purposive sampling using “information rich cases..” (Patton, 1990) may have been a preferable approach.

Half the male candidates declined to participate and approximately 1/3 of females failed the inclusion criteria. There is no discussion as to why this occurred or the possible impact. The study claims to be ethnically and socially diverse, but the majority of cases were white British calling this assertion into question. An ideal study may have benefited from maximum variation sampling to “cover the spectrum of positions and perspectives” (‘Maximum Variation Sampling’, 2008), but there is no evidence that the researchers considered or tried to apply this.

1. **Are data collection methods justified and does the data help answer the research questions?**  
   Data collection was via individual semi structured interviews. No rationale is given for this choice and no discussion indicating if other methods were considered/discarded. Semi-structured interviews encourage reciprocity between interviewer and participant and work well with a grounded theory approach (Lazar *et al.*, 2016). Interviews are good for developing “thick” descriptions (Bourgeault, Dingwall and De Vries, 2010 P308). Given the lack of engagement inherent in the study group, it is unlikely that any data gathering method using group or prolonged interaction would have been accepted by the participants. Therefore, the 1:2:1 interview seems to be an appropriate choice of method.

Interviews were carried out by a single interviewer. This could be beneficial, only introducing one interviewer’s world view into the process (Matteson and Lincoln, 2009). Interviews were of a significant length, indicating that a reasonable depth of discussion took place.

Demographic data and measures to assess loneliness, social interaction, and depression were gathered at interview. No rationale is provided to justify this, and it seems strange that the same data was not used at the sampling stage.

1. **Is there a clear description of how data was analysed and represented in the findings?**  
     
   Thematic analysis was undertaken using a Constructivist Grounded Theory (CGT) approach. CGT assumes avoidance of preconceptions and develops theories which grow solely from a description of the data (McClean *et al.*, 2020). Several issues in the paper call into question the validity of approach and raise questions as the way CGT was used in the study.

The paper describes coding in the light of existing published research and known barriers, implying preconception and prejudgement. It refers to “coding all data that held relevance to the research questions”, implying data was excluded from coding, potentially resulting in “cherry picking” (Morse, 2010).   
  
Coding by a single researcher could result in reduced theoretical sensitivity, (Judith A. Holton, 2010) and all researchers having similar professional backgrounds potentially limits broader perception and analysis. Iterative coding during the study is an essential part of theoretical sampling methods usually associated with grounded theory (McCrae and Purssell, 2016) but that does not appear to have been undertaken for his study and deviant cases are not considered even though they are important for testing theory development in CGT (Pope, Ziebland and Mays, 2000).

1. **Has the relationship between researcher and participants been adequately considered? Is there a statement locating the researcher culturally or theoretically?**

The paper appears to reflect with the voice of the participants using quotes linked to themes and clusters. However, the decision on what material should be included clearly places power in the researchers’ hands (Råheim et al., 2016). All of the researchers are clinical psychologists, with an interest in older people and ageism, potentially imposing an pre-existing frame on the analysis, and introducing potential bias (Crotty, 1998). This is particularly important as the researcher is considered the primary research instrument in qualitative studies (Xu and Storr, 2015).

The quality assurance paragraph refers to avoiding of bias, a reflexive stance, transparency, and a team-based approach. This is not supported by the predominantly single person managed transcribing and selective coding of material.

Recruitment was controlled by a single researcher with no explanation given for exclusion criteria. This makes difficult to be sure that potential participants were not unfairly excluded from the study.

There is no evidence the reflective stance resulted in any significant changes to the initial research protocol, The only mention is in the analysis section where the paper mentions “minor adjustments where appropriate”

1. **Are participants, and their voices, adequately represented?**  
     
   The study attempts to represent the participants voice by using individual quotes and developing a list of social identities. Using quotes is the “gold standard” to underpin the themes identified (Brown, 2010). However, the study focusses on some participants more than others. P5,9 and 11 for example have 5 mentions whilst P6 has 1 and P13 no quotes at all. It can be assumed that the researcher chose key quotes to support findings from the study but further information on why quotes were chosen would have improved transparency and confidence in the results (Eldh, Årestedt and Berterö, 2020).

Coding identified 14 and 4 clusters, illustrated and supported using quotes from the participants. This approach represents good practice (Thornberg and Charmaz, 2013), but the decision to only code “data items that held relevance to the research questions”. implies selection/exclusion of material. The reasons for exclusion are not explained in the paper and could be considered as cherry picking (Morse, 2010). Selective coding may have excluded some of the participants voices, particularly if the research team’s psychology background and possible preconceptions are factored in.

1. **Is the research ethical according to current criteria or, for recent studies, and is there evidence of ethical approval by an appropriate body?**  
     
   The values surrounding “research ethics” in qualitative studies are not obvious or agreed (Hammersley, 2022 PP.25), but there is a general principle that that risks to participants should be assessed and mitigated, That informed consent should be obtained, That participants understand the purpose of the research, that confidentiality is maintained and that any concerns or questions can be addressed (Tolley, 2016 PP.75).

The study refers to obtaining approval from the University College of London Research Ethics Committee and the guidelines from the Declaration of Helsinki. The details of ethical consideration are subsumed in a discussion of the methodology and methods used for the study. However, informed consent is addressed three times with each participant and the identities of participants are anonymised. Participants were informed of the nature and purpose of the research (by leaflet) and given the opportunity to ask questions of the interviewer.

On balance, whilst the ethical approval process is not fully documented the combination of university approval, and details re consent, information and dialogue with participants mentioned in the paper it appears that ethical considerations were adequately addressed.

1. **Do the conclusions drawn in the research paper flow from the analysis, or interpretation, of the data?**  
     
   The study adopted a logical approach to the analysis, developing themes and clusters and using these to identify barriers to participation and evidence of coping strategies. CGT was used to posit a theory and possible explanation of apparently contradictory behaviours. There was a natural and understandable flow through the process from selection, data gathering, analysis, discussion, and conclusions.

The paper was bedded in existing literature and identified barriers to participation which broadly agreed with established knowledge. Using thematic and cluster analysis it identified how participants modified their own behaviours and expectations to handle social isolation and loneliness. Crucially, it was able to develop the understanding of social fears and developed the concept of participants having preferred and specific social identities which may pose an psychological barrier to engaging with new groups.

There are issues re recruitment, transparency and reflectivity and the paper can be criticised for not fully identifying and considering deviant cases. However, it able to demonstrate the importance of identity and propose new and innovative approaches addressing the issue of social identity that may encourage future participation of socially isolated individuals.

**Word Length Part 2 1637, excluding Questions. Max word length permitted 1500 +/-10% (1650)**

**Total submission Word Length, excluding Questions 3284**

**Max word length permitted 3000 +/-10% (3300)**

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