When face-to-face interviews are not possible: tips and tricks for video, telephone, online chat, and email interviews in qualitative research

Markus Saarijärvi1,2* and Ewa-Lena Bratt1,3

1Institute of Health and Care Sciences, Sahlgrenska Academy, University of Gothenburg, Gothenburg, Sweden; 2Department of Public Health and Primary Care, KU Leuven, Leuven, Belgium; and 3Department of Pediatric Cardiology, Queen Silvia’s Children’s Hospital, Sahlgrenska University Hospital, Gothenburg, Sweden

Received 22 March 2021; editorial decision 25 March 2021; accepted 26 March 2021

Face-to-face interviews have long been the norm for conducting qualitative interviews in healthcare research. However, the Covid-19 pandemic has accelerated the need to explore alternative methods. This, along with the swift digitalization of healthcare, has led to video, telephone, and online interactions becoming increasingly used. The use of new techniques to carry out interviews through video, telephone, and online applications all come with benefits and drawbacks. In this article, three ways of collecting data through qualitative interviews are described and their uses exemplified through a project investigating the impact of a transition program for adolescents with congenital heart disease.

Keywords Qualitative research • Research methods • Interviews • Focus groups

Learning objectives
• Identify and explore different data collection methods for qualitative interviews at a distance.
• Describe and understand how to perform qualitative interviews at a distance and recognize their application for different types of research topics, populations and contexts.
• Understand the benefits and challenges associated with performing qualitative distance interviews.

Introduction

The Covid-19 pandemic has accelerated the need to explore alternative data collection methods for qualitative research in cardiovascular nursing. This has become especially evident in ongoing studies due to the Covid-19 restrictions. Social distancing, travel bans, and other restrictions have had practical implications for the traditional face-to-face data collection method, with researchers having to rapidly switch to alternative solutions such as, telephone or video interviews. New technology has also paved the way for exploring alternative data collection methods to carry out qualitative interviews. This swift transition has been possible thanks to a prompt digitization process, which has accelerated during the Covid-19 pandemic.

But first, what is a qualitative interview? A qualitative interview is described as a data collection method where an interviewer asks questions to an interviewee either face-to-face or at a distance. It is conceptual and theoretical and based on the meanings that life experiences hold for the interviewees. On the basis of these descriptions, data collection can be conducted in several ways, of which face-to-face interview is considered to be the gold standard. Nevertheless, despite its favoured position, face-to-face interviews have disadvantages that need to be discussed in the light of other data collection methods.

* Corresponding author. Tel: +46 31-786 61 58, Email: markus.saarijarvi@gu.se
© The Author(s) 2021. Published by Oxford University Press on behalf of the European Society of Cardiology.
This is an Open Access article distributed under the terms of the Creative Commons Attribution-Non-Commercial License (http://creativecommons.org/licenses/by-nc/4.0/), which permits non-commercial re-use, distribution, and reproduction in any medium, provided the original work is properly cited. For commercial re-use, please contact journals.permissions@oup.com
Increased digitalization in healthcare and society means that in the future, it may be just as natural for interviewees in the healthcare setting to anticipate digital encounters with researchers, as face-to-face ones. As a consequence, the traditional qualitative data collection methods may become outdated in a new and more digitalized world. In this article, we will describe and discuss three alternatives to face-to-face interviews, presenting the strengths and limitations of each different method and its appropriacy for which type of research. Triangulation/mixing different techniques of distance interviews will also be briefly presented, taking a practical example from ongoing studies within cardiovascular nursing.

Comparing different interview methods

When comparing interview methods, it is important to consider differences in strengths and limitations related to their differences in the dimensions of synchronous/asynchronous communication in time and/or space. Face-to-face interviews are considered to be synchronized in time and space, which makes this method superior in this respect. Video, telephone, and online chat interviews are considered to be characterized by synchronous communication in time, but asynchronous communication in place. It can be argued that these methods are synchronized in terms of space but it all depends on how space is defined. Although cyberspace can be described as a virtual rather than a real place, communicating in cyber space has advantages and disadvantages compared to real place communication, such as in face-to-face interviews. The advantages and caveats of each method is visualized in Figure 1.

The face-to-face interview

In face-to-face interviews, the interaction between the interviewer and the interviewee is always direct and with no delays due to technical disruptions. Body language, facial expressions, and other non-verbal social signals are obvious to the interviewer. Another advantage is that the physical meeting can increase the possibility of creating a safe and comfortable atmosphere. These attributes may be more or less important depending on the purpose and the research question. However, face-to-face interviews can be time-consuming and expensive, as they involve travel that can be both costly and in some cases also involve a risk, if the interviewer or the interviewee has to travel through or to areas with an increased risk to personal safety.

The video interview

The video interview is considered to be most similar to the face-to-face interview. It has been suggested that face-to-face interviews are only marginally superior to video interviews. The potential study population for inclusion in such studies is expanded, as people can participate regardless of where they live. The researcher does not need to take into account aspects such as travel, distance, or safety. However, when it comes to the actual interview situation, there are some aspects that differ from face-to-face interviews. The interviewee can see and observe the interviewee completely or partially, depending on how the person is placed in front of the camera, and interpret facial expressions, body language, and to some extent other non-verbal signals. Nevertheless, there are some limitations that need to be addressed. Video interviewing requires reliable technology, where both a stable internet connection, good quality camera, and microphone are crucial. Some groups may be excluded because they do not feel comfortable with or have access to the technology required. Moreover, it is particularly important to think about confidentiality. There is a potential risk that another uninvited person is present in the room (not visible) and could potentially be an influencing factor. This is especially important to consider if sensitive topics are to be addressed in the interview.

The telephone interview

As with the video interview, telephone interviews give access to participants from a large (unlimited) geographical area, but assumes that they have access to a telephone. This technology allows a greater opportunity to interview participants in areas that are difficult to reach for various reasons (e.g. war zones, areas with extensive spread of infectious diseases, or areas with unstable internet connection). Disadvantages are that facial expressions, body language, and other non-verbal signals are not observed during the interview. Nevertheless, information can be gleaned from the voice and intonation. The telephone interview is suitable for shorter interviews that are specific and not too personal. For people with hearing problems telephone interviews can be difficult. Even though the volume can often be adjusted, it is more difficult because they do not see the face and mouth/lips of the interviewer. Moreover, as with the video interview situation, there is the same risk when it comes to confidentiality. For various reasons and depending on the subject of the interview, there may also be a potential risk of the interview being conducted with someone pretending to be the actual participant, which might be difficult to verify.

The online chat and email interview

The online chat and email interview also have the advantage of wider access to participants. The difference between an online chat and an email interview is that the online chat interview can be considered synchronized in time through the simultaneous use of the internet to engage in a (text-based) real-time conversation via some form of ‘instant messaging’. The lack of ability to listen to voice mode and intonation can to some extent be mitigated by the use of emoticons and ‘emojis’. One way to make this more structured is to formulate a matrix in advance to explain different emoticons/emojis and their meanings. This may be particularly important if the interviewees come from different countries and cultures, as these symbols can have different meanings depending on the context. It has been suggested that email/chat interviewing are appropriate for use in sensitive topic research and found to be equivalent to telephone interviews. The asynchronous communication in time and/or space provides more time for the interviewee to reflect before answering. This may be an advantage in interviews where sensitive topics are addressed. Another advantage is that the text is already transcribed but requires the interviewer to put time and effort into the answers and the follow-up questions so that the participant feels valued. However, like video interviews, this method requires the interviewee to be comfortable with the communication tool (mail or chat) and
have access to the necessary equipment. It has been suggested that email interviews are equivalent to a telephone interview.  

Software

Different software programmes are available for conducting video interviews. It is important, however, to choose software that follows the local and national security regulations. Zoom is commonly used due to its user friendliness, possibility to share the screen to show visual information, and ability to record the interview.  

Recording the screen can also open up for a variety of analysis methods, such as interaction analysis. However, the interviewee’s preferences should always be respected when screen recording, as it might be considered sensitive in comparison to audio recording. If encryption is needed to safeguard security and confidentiality during the video interview, Apples FaceTime and Microsoft Teams are reliable options if Zoom is not considered safe enough.

Whether the interview is performed via video or telephone, an audio recording device is necessary in order to transcribe the

Figure 1 Advantages and caveats of face-to-face, video, telephone, and online chat/email interviews.
An example of using different forms of distance interviews in one single study is the STEPSTONES (Swedish Transition Effects Project Supporting Teenagers with chronic mEdical conditionS) project, which evaluates a transition programme for adolescents with congenital heart disease. Here, a process evaluation was carried out to which evaluates a transition programme for adolescents with congenital heart disease. In short, interviews with participating adolescents and parents were conducted by telephone, face-to-face, video, and email. As reaching and recruiting adolescents for research studies is a challenge, being able to provide different types of interview forms helped reach as many participants as possible, as they could choose the type of interview they were most comfortable with. However, analysing data obtained through different techniques can be challenging, as different data sources might provide different amounts of depth to a subject. The ongoing Covid-19 pandemic was the reason for conducting these focus groups through video link. As has been observed in other studies, video interviews created a closer bond between the interviewer and interviewee compared to telephone interviews, which makes it easier for some individuals to open up about the research topic. However, some practicalities and considerations need to be addressed before commencing the interview. These experiences are summarized in Table 1.

Example of performing and mixing distance interviews: the STEPSTONES project

An example of using different forms of distance interviews in one single study is the STEPSTONES (Swedish Transition Effects Project Supporting Teenagers with chronic mEdical conditionS) project, which evaluates a transition programme for adolescents with congenital heart disease. Here, a process evaluation was carried out to investigate the implementation process and mechanism leading to the outcomes. In short, interviews with participating adolescents and parents were conducted by telephone, face-to-face, video, and email. As reaching and recruiting adolescents for research studies is a challenge, being able to provide different types of interview forms helped reach as many participants as possible, as they could choose the type of interview they were most comfortable with. However, analysing data obtained through different techniques can be challenging, as different data sources might provide different amounts of depth to a subject. The ongoing Covid-19 pandemic was the reason for conducting these focus groups through video link. As has been observed in other studies, video interviews created a closer bond between the interviewer and interviewee compared to telephone interviews, which makes it easier for some individuals to open up about the research topic. However, some practicalities and considerations need to be addressed before commencing the interview. These experiences are summarized in Table 1.

Table 1 Practical details and considerations when performing video interviews

| Before interview                                      | During interview                                      |
|-------------------------------------------------------|------------------------------------------------------|
| • Send information and informed consent to the interviewee well in advance. | • Perform the interview in a calm and undisturbed environment |
| • Re-send this information at least 1 day before the interview. | • Test remote recording device if using this |
| • Information to interviewee should state:             | • Open video link at least 15 min before planned interview |
|   • Need for a smartphone or computer with software installed if needed | • When participant(s) arrive, make sure that sound and video work |
|   • Video camera option on smartphone/computer if possible | • Introduce yourself and purpose of interview |
|   • Link to meeting                                   | • Repeat previous information sent to participants |
|   • Need for a stable internet connection and a calm environment in which to perform interview | • Short presentation of participant(s) |
|   • Advice on keeping a glass of water to hand, as talking might induce dry-ness of mouth | • Certain considerations for focus groups: |
|   • Use of headphones is preferably to enhance audio quality experience | • Make sure that all participants can hear and see each other |
|   • Practice session can be offered if interviewee is unfamiliar with software or video interviews | • Ask participants to mute themselves when silent and unmute when talking |
|                                                          | • If possible, make sure all participants have video switched on to facilitate the group dynamic |
|                                                          | • Avoid talking over each other as much as possible. Use ‘raise hand’ or chat function in software |
Another critical aspect when reporting qualitative studies using distance interview techniques is ethical consideration and reflection. On the one hand, digital interviewing might create opportunities to include people in research studies who would otherwise be excluded due to geographical distance. However, technical literacy along with availability of technical tools and internet connection might exclude people with low socio-economic status, older people, and children. Therefore, to promote equity and equality in research, we advocate the use of preference-based interview techniques, whereby the interviewee can select from a variety of mediums.

Conclusion

Qualitative interviews performed through video, telephone, and online are valid and trustworthy alternatives to traditional face-to-face interviews. Moreover, these interview methods might bring reform to the notion that face-to-face interviews are the gold standard, as interviews performed from a distance serve their purpose in a more cost-effective way while promoting inclusion and equality in research.

Conflict of interest: none declared.

References

1. Van Bulck L, Kovacs AH, Goossens E, Luyckx K, Jaarsma T, Strömberg A, Moons P. Impact of the COVID-19 pandemic on ongoing cardiovascular research projects: considerations and adaptations. Eur J Cardiovasc Nurs 2020;19:465–468.
2. DiCicco-Bloom B, Crabtree BF. The qualitative research interview. Med Educ 2006;40:314–332.
3. Opdenakker R. Advantages and disadvantages of four interview techniques in qualitative research. FQS 2006;7:11.
4. Krouwel M, Jolly K, Greenfield S. Comparing Skype (video calling) and in-person qualitative interview modes in a study of people with irritable bowel syndrome—an exploratory comparative analysis. BMC Med Res Methodol 2019;19:219.
5. Burke LA, Miller MK. Phone interviewing as a means of data collection: Lessons learned and practical recommendations. FQS 2001;2:7.
6. Pophis D, Beck CT. Nursing Research: Generating and Assessing Evidence for Nursing Practice. 11th ed. Philadelphia: Wolters Kluwer Health; 2020.
7. Neville S, Adams J, Cook C. Using internet-based approaches to collect qualitative data from vulnerable groups: reflections from the field. Contemp Nurs 2016;52:657–668.
8. Hershberger PE, Kavanaugh K. Comparing appropriateness and equivalence of email interviews to phone interviews in qualitative research on reproductive decisions. Appl Nurs Res 2017;37:50–54.
9. Archibald MM, Ambagtsheer RC, Casey MG, Lawless M. Using zoom videoconferencing for qualitative data collection: perceptions and experiences of researchers and participants. Int J Qual Methods 2019;18:160940691987459.
10. Acuna-Mora M, Sparud-Lundin C, Bratt E-L, Moons P. Person-centred transition programme to empower adolescents with congenital heart disease in the transition to adulthood: a study protocol for a hybrid randomised controlled trial (STEPSTONES project). BMJ Open 2017;7:e014593.
11. Saanijari M, Wallin L, Moons P, Gyllensten H, Bratt EL. Transition program for adolescents with congenital heart disease in transition to adulthood: protocol for a mixed-method process evaluation study (the STEPSTONES project). BMJ Open 2019;9:e028229.
12. Saanijari M, Wallin L, Moons P, Gyllensten H, Bratt EL. Factors affecting adolescents’ participation in randomized controlled trials evaluating the effectiveness of healthcare interventions: the case of the STEPSTONES project. BMC Med Res Methodol 2020;20:205.
13. Saanijari M, Wallin L, Gyllensten H, Moons P, Bratt E-L. Mechanisms of impact and experiences of a person-centered transition programme: the STEPSTONES project. (Submitted). 2021.
14. Irani E. The Use of Videoconferencing for Qualitative Interviewing: Opportunities, Challenges, and Considerations. Los Angeles, CA: SAGE; 2019.
15. Tong A, Sainsbury P, Craig J. Consolidated criteria for reporting qualitative research (COREQ): a 32-item checklist for interviews and focus groups. Int J Qual Health Care 2007;19:349–357.