


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

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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.¹ 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.² It is conceptual and theoretical and based on the meanings that life experiences hold for the interviewees.² 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.

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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.³ 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.³ 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.³ 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.⁴ 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 interviewer 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.⁴ 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.⁵ The telephone interview is suitable for shorter interviews that are specific and not too personal.⁶ 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'.⁷ The lack of ability to listen to voice mode and intonation can to some extent be mitigated by the use of emoticons and 'e-mojis'. One way to make this more structured is to formulate a matrix in advance to explain different emoticons/e-mojis 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.³ It has been suggested that email/chat interviewing are appropriate for use in sensitive topic research and found to be equivalent to telephone interviews.^{7,8} 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.⁶ However, like video interviews, this method requires the interviewee to be comfortable with the communication tool (mail or chat) and



Figure 1 Advantages and caveats of face-to-face, video, telephone, and online chat/email interviews.

have access to the necessary equipment. It has been suggested that email interviews are equivalent to a telephone interview.⁸

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.⁹ 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

interview verbatim. A practical tip to facilitate audio recording is to have the telephone or computer audio on speaker, with the audio recording device on the side. There are applications available for smartphones that can record telephone conversations. However, local and national security regulations must be considered. For this reason, we propose the use of a separate audio recording device on which audio files can be stored and password-protected in a secure database. For email and chat interviews, confidentiality is an important consideration. Using a password-protected email programme and refraining from writing personal information in the email conversations (i.e. full name, national identification number etc.) is therefore crucial.

Analysis of interview data is preferably carried out with computer-assisted qualitative data analysis software, such as NVivo. These software programmes also facilitate the analysis of data from different sources (i.e. video, telephone, and email/chat) with the possibility of sorting and categorizing different data sources in a comprehensive way.

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.¹⁰ Here, a process evaluation was carried out to investigate the implementation process and mechanism leading to the outcomes.¹¹ In short, interviews with participating adolescents and parents were conducted by telephone, face-to-face, video, and email.^{12,13} As reaching and recruiting adolescents for research studies

is a challenge,¹² 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.^{7,8} However, analysing data obtained through different techniques can be challenging, as different data sources might provide different amounts of depth to a subject.⁴ In our study, we dealt with this by comparing the findings of the email interviews with the findings of the video, telephone, and face-to-face interviews. We found that although the number of codes differed between the sources, the substance and content did not, proving that combining data from different sources in a single study can provide trustworthy findings.

In addition to interviews with participating adolescents and parents, we performed focus groups by Zoom with healthcare professionals working at the different hospitals associated with the study.¹¹ 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.^{9,14} However, some practicalities and considerations need to be addressed before commencing the interview. These experiences are summarized in [Table 1](#).

Reporting

As with any qualitative study, the use of reporting guidelines such as the 'Consolidated criteria for reporting qualitative research' (COREQ) checklist¹⁵ is advised to use to safeguard transparency and trustworthiness. Indeed, transferability of findings of qualitative studies are dependent on the transparency of the data collection and analysis process. A detailed method description is therefore crucial when combining data collected through different techniques in one single study.

Table 1 Practical details and considerations when performing video interviews

Before interview	During interview
<ul style="list-style-type: none"> • Send information and informed consent to the interviewee well in advance. • Re-send this information at least 1 day before the interview. • Information to interviewee should state: <ul style="list-style-type: none"> • Need for a smartphone or computer with software installed if needed • Video camera option on smartphone/computer if possible • Link to meeting • Need for a stable internet connection and a calm environment in which to perform interview • Advice on keeping a glass of water to hand, as talking might induce dryness of mouth • Use of headphones is preferably to enhance audio quality experience • Practice session can be offered if interviewee is unfamiliar with software or video interviews 	<ul style="list-style-type: none"> • Perform the interview in a calm and undisturbed environment • Test remote audio recording device if using this • Open video link at least 15 min before planned interview • When participant(s) arrive, make sure that sound and video work • Introduce yourself and purpose of interview • Repeat previous information sent to participants • Short presentation of participant(s) • Certain considerations for focus groups: <ul style="list-style-type: none"> • Make sure that all participants can hear and see each other • 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.⁹ 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.

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