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# Realities Toolkit #14

# Using phone interviews

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## Introduction

Telephone interviews offer a range of potential advantages for qualitative research projects. Most obviously, they remove the need for travel, so reduce both time and cost. They also allow participants to remain more anonymous if desired, they may feel less emotionally intense or intrusive, and there may be physical safety advantages for both researcher and participants. However, the methodological literature has traditionally advised against using the telephone for qualitative interviews. The two main concerns that are raised relate to (i) implications for the social encounter and scope for achieving 'rapport' and (ii) the loss of visual or non-verbal cues which are thought to aid communication and convey more subtle layers of meaning.

The empirical evidence base on what difference using the telephone makes to the qualitative interview process and the resulting data is currently fairly small and based mainly on impressionistic accounts rather than systematic mode comparisons. However, researchers who have published first-hand reflections (see Further Reading, below) conclude that, on the whole, concerns about rapport or loss of meaning are somewhat exaggerated or unfounded.

Several of the projects that I have been involved in whilst working in social research have used qualitative telephone interviews, for a variety of reasons. Sometimes the decision to use telephone interviews has been planned into the research design, for example, for follow-up waves of a longitudinal study. At other times it has been a one-off response to practical constraints that have arisen during the study (e.g. when bad weather prevented travel) or ethical considerations (e.g. when a participant who experienced a mental health condition found it difficult to meet face-to-face).

In this Toolkit, I offer some reflections on my experiences of conducting qualitative interviews by telephone. I also present some key findings of a recent exploratory study (Irvine, Drew & Sainsbury, 2010) in which we attempted to shed more light on what interactional differences exist between qualitative research interviews that are carried out by telephone or face-to-face. The mode comparison study drew upon a small set of semi-structured interviews that I had conducted for a previous project on mental health and employment (Irvine, 2008). For that project, we had originally intended to conduct all interviews face-to-face. However, recruitment rates to the study were higher than

anticipated and so I did some of the interviews by telephone, so that all volunteers could be included in the study whilst keeping within planned budgets and timescales.

Because the interviews in each mode were carried out by the same researcher, this gave us a good opportunity to conduct a controlled comparison of what difference interview mode might make to the research interaction. Also, we came up with the idea of the comparative study after the interviews had been completed, so I was not consciously monitoring my interview approach in either mode at the time of the original fieldwork. We used conversation analytic techniques to explore what interactional differences were apparent between the two groups of interviews.

## Things to consider when using telephone interviews

### Recruitment and consent

Many of the same practical and ethical considerations that apply when setting up face-to-face qualitative interviews need to be taken into account when using the telephone. In studies I have been involved in, we have never used 'cold calling' to recruit to telephone interviews. The initial invitation to participate has always been made in a written format, either through a personal letter, an email alert or a flyer. This is followed by a first phone call (or email, if this is the way the participant chooses to communicate) to make initial introductions, provide further details about the research and establish agreement in principle. The interview itself takes place at a later agreed date.

It is important to go through the same explanations and procedures to ensure informed consent as you would in a face-to-face interview. I record consent orally when beginning a telephone interview, reading the consent form out to people over the phone and asking them to confirm their agreement while the recorder is running. I usually offer to post a copy of the consent form to participants, but some participants don't feel this is necessary.

### Focus, attention and stamina

In some ways, using the telephone allows you to be a bit more relaxed while carrying out research interviews. For example, there is no need to dress in a particular way to suit the encounter. You can also check your progress through the interview guide and take notes without this being seen by the participant. However, I have found that it is easier to lose concentration or become distracted when interviewing by telephone. Sometimes I find that my attention has drifted and I have not been listening as closely as I should. Therefore, I would caution against feeling too relaxed or becoming complacent about the amount of 'professional attention' that is required during telephone interviews. If possible, conducting interviews away from your usual desk space (and especially your computer!) may help.

Although the reduction in travel means that it is possible to do more interviews in less time, I would also caution against the temptation to fit too many interviews into one day. In my experience, qualitative telephone interviewing requires just as much stamina and concentration as face-to-face interviewing, if not more. My advice would be not to plan to do any more interviews in one day than you would if you were going out to do interviews in the field and (if possible) to schedule these for times of day that you would normally conduct fieldwork. One of my most challenging telephone interviews, for focus and attention, was one that we had arranged to begin at 7.00pm. This was also the third

interview of the day and I regretted this scheduling decision almost as soon as the interview had begun.

## Comfort, breaks and interruptions

In telephone interviews, we usually have less insight into the participant's physical setting during the research encounter. Given that we will probably know little about their immediate environment when we call participants for a telephone interview, it can be useful to take a few moments at the beginning to check that they are feeling settled and comfortable. In one of the telephone interviews in our mode comparison study, the participant explained part way through that she needed to get herself a drink to ease her dry throat. She was evidently able to do so whilst continuing the conversation (sounds of drink preparation could be heard in the background). However, this is a reminder that participants may be less able to attend to personal comforts during a telephone interview, if mobility or dexterity is restricted while using the phone.

Telephone interviews may also restrict the scope for taking breaks during the interview. When conducting research on sensitive or emotional subjects, it can sometimes be useful to change to a more neutral topic for a while, to pause the 'formal' interview temporarily or create a diversion, for example, making a cup of tea. It may more be difficult to take breaks in a way that seems natural over the phone. If a telephone participant becomes upset and wishes to take a complete break from the conversation (i.e. hang up), it might feel awkward to ring back and pick up the conversation at a later date or the participant may choose not to resume. That said, in the few instances in my experience where telephone participants have become upset, they have always declined my offer to take a break and said they would prefer to carry on.

In general, it may be useful to ask at the beginning of a telephone interview whether the participant anticipates any interruptions or needing to take a break at any point – the flow of the interview could then be planned to accommodate this. This might be especially important to check if you know that the participant has a health condition, disability or caring responsibilities.

## Technical issues

As a basic point, it is important to have a good quality phone line, both for communication during the interview and for later transcription. Although it has not happened often in my experience, a telephone connection does sometimes cut out unexpectedly. Presumably this problem is more likely to arise if a participant is speaking to you on a mobile phone.

Most recently, I have used the Olympus DM-20 Digital Voice Recorder for telephone interviews. An adapter can be connected between the telephone and the handset, which integrates the recorder into the phone line and produces a good quality recording. I have also used purpose-built telephone interviewing equipment which has a recording device integrated into the telephone itself and the recording can then be transferred onto a CD. In my experience, however, this equipment produces a less clear recording than the digital recorder connected to my ordinary desk telephone via an adapter.

Photo of a phone adapter for a digital audio recorder.

### Visual materials and gesture

Telephone interviews clearly place limits on the extent to which documents can be shared or visual tasks completed during the interview. It may be possible to send reference materials in advance by post or email. However, it will probably be impractical to carry out interviews that involve some kind of task-based exercise by telephone. Notably, although few of the projects I have worked on have been specifically designed to include visual tasks, there have been a number of occasions when participants spontaneously took up a pen and began mapping something out, or used gesture to explain their point. As such, even if your interview method does not rely on shared visual tasks, by using the telephone there may be missed opportunities for people to enhance or supplement their spoken contributions in different ways.

## Interactional differences in telephone and face-to-face interviews

### Effects on the spoken interaction

Other researchers who have written about their experiences of telephone interviews have commented on problems of interruption or speaking over one another. In our mode comparison study, although there were several instances of speaker overlap, we did not find a notable difference in their frequency between telephone and face-to-face interviews. However, we did find that I used relatively fewer verbal acknowledgements (things like *mm hm*, *right*, *yeah*) during telephone interviews, which is perhaps surprising given the absence of non-verbal acknowledgements such as nods or smiles.

Another finding was that participants sometimes checked that what they were saying was 'along the right lines', i.e. that they were giving me relevant or sufficient information. Although our mode comparison data set was small, it seemed that these participant checks on the adequacy of their talk happened more regularly in telephone interviews. There was also some suggestion that participants asked for clarification or reiteration of questions more often when being interviewed by telephone. We cannot say for certain from our study what the reasons for these differences were, but it seems likely that they stemmed in part from a combination of the lack of visual cues, greater efforts required to hear each other and perhaps also greater challenges to concentration or focus.

### Rapport and social interaction

Rapport is a concept which is hard to measure and is perhaps worthy of research exploration in itself. Furthermore, the type of rapport that we might want to establish with different participants in different research contexts may vary. Therefore, I would hesitate to make any firm statements about telephone interviews and rapport. To share my own experience, however, prior to carrying out our mode comparison study, my

impression had been that the telephone interviews had not suffered in particular when it came to establishing rapport. Although some participants had become upset during the conversation, I felt that all interviews had begun and ended on a good note. However, having spent several months closely engaged with the set of interviews when working on the comparative study, I did end up feeling that there was something different about the ambience in the telephone interviews as compared to face-to-face. While it remains intangible, the face-to-face interviews did generally seem to have a more relaxed and sociable feel to them. In part, this may have come about because of the longer time spent on social preliminaries in the face-to-face encounters, while we did the 'meet and greet', made cups of coffee, met the family pets, and so on. During telephone interviews I found there was a tendency to get down to business more directly, which may have led to a sense of a more formal and less social encounter.

### Quantity and quality of data

In our mode comparison study, we found that on average, telephone interviews were shorter than face-to-face interviews. Considering all 28 of the interviews that I conducted for the original project, the nine telephone interviews were on average 15 minutes shorter than the 19 face-to-face interviews. Moreover, this shorter length of telephone interviews was due to the participant speaking for less time, rather than both of us reducing our talk proportionally. However, in all interviews, the main research questions were covered. To some extent, therefore, the difference was in depth of detail in responses rather than breadth of coverage. However, the additional data generated in the face-to-face interviews was not necessarily crucial to answering our key research questions more effectively and sometimes included 'off topic' elaboration. Therefore, I would hesitate to draw conclusions about the quality of the data based only on the fact that telephone interviews tended to be shorter than face-to-face interviews. Depending on a study's research questions and aims, *more* data may not necessarily equal *better* data.

One significant point, however, is that when conducting interviews by telephone, the opportunity to capture that valuable nugget of information that is often offered as a postscript once the recorder has been turned off may be more limited. In one of the face-to-face interviews in our mode comparison study, this 'final thought' became so elaborate that we turned the recorder back on again and a further six minutes of useful data was captured. When conducting telephone interviews, I tended to wrap up the interview and move fairly directly into thanks, goodbyes and hanging up. There was limited opportunity for these final reflections to emerge as they might do during a more extended departure in a face-to-face encounter.

## Conclusion

Based on my experience of conducting telephone interviews in a range of projects, alongside the findings of our mode comparison study, my feeling is that telephone interviews certainly have a useful place within the range of interview modes we might choose from for qualitative research. They should not be summarily dismissed as unsuitable for qualitative research. But at the same time, they should be recognised as producing a somewhat different type of interaction, which might have disadvantages for *some kinds of* research study. Therefore, it would be unwise to treat telephone interviews uncritically as a universal substitute for face-to-face research encounters.

Our mode comparison study was based on only a small number of interviews, carried out by just one researcher. However, our findings suggest that there *are* some differences to

be found between telephone and face-to-face research interviews. Whether or not these differences are important to a given study is a separate question. In many cases, the practical or ethical motivations for using telephone interviews may be reason enough to justify that mode, despite any perceived interactional shortcomings. Projects which seek relatively simple or descriptive data may not require immersion in the participants' environment or a level of rapport that encourages personal revelations or extended reflective accounts. On the other hand, for some studies, such in-depth material – which our findings tentatively suggest may be more forthcoming in face-to-face settings – could be crucial in thoroughly addressing research questions.

Further empirical studies exploring mode-related difference in qualitative interviews would be valuable, to broaden the evidence base on what kinds of differences consistently appear between telephone and face-to-face interviews. From this, we would be in a better position to assess the implications for any given project and, if necessary, to modify our approach to interviewing in ways that address any potential risks to the quality or usefulness of the data.

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