

## Tips and Tools for Remote Qualitative Data Collection

Phone and videoconference interviews and focus groups are increasingly common qualitative data collection methods. With thoughtful decision making and planning, remote qualitative data collection can be conducted successfully and with scientific rigor.

When conducting remote qualitative data collection, the basic principles of in-person interviewing and focus group facilitation apply. Unique considerations for remote qualitative data collection are discussed below. For questions, additional information, or support, please contact us at [engagement.nctracs@unc.edu](mailto:engagement.nctracs@unc.edu).

*Please note that this is a working document and we are continually seeking to refine these guidelines. If you would like to provide any feedback on the guidelines, please contact us at [engagement.nctracs@unc.edu](mailto:engagement.nctracs@unc.edu). You can access the most current version of the guide at <https://tracs.unc.edu/index.php/services/engagement/qualitative-research-services>.*

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### Navigating regulatory approvals

- Your IRB protocol should note clearly that study procedures are occurring remotely and describe the ways in which remote activities will occur, including consent processes, data collection methods (including virtual platforms used), and compensation methods (e.g., e-gift card).
- Consider consulting with the IRB to see if verbal or electronic consent would be possible.
  - A verbal consent process may include emailing participants a concise information sheet about the study, including risks and benefits of participating, in advance. The interviewer or focus group facilitator can use a script to obtain consent from the participant before the interview or focus group.

- A sample information sheet template and verbal consent script can be found in Appendices A and B.
- Verbal consent processes can often be completed at the beginning of an interview session. For focus groups, it can be helpful to schedule brief, individual calls with participants to complete verbal consent in advance.
- Electronic consent may involve sending participants a survey (e.g., Qualtrics, REDCap) that contains the study information and asks them to indicate their consent for participating and being audio/video recorded. Some survey platforms will also allow participants to provide a signature.
- If you will be audio and/or video recording, participants must consent to being recorded. Your study should determine in advance whether you will allow participants who do not consent to recording to continue participating, and make that clear to participants.
- Consult with IRB and your IT consultants about audio/video recording options and videoconference platforms to ensure they adhere to HIPAA and data security requirements.

## Setting yourself up for technological success

- Determine the technology you will use for the data collection activity and how you will record the conversation (if applicable). Things to consider when selecting technology include:
  - For interviews, whether a phone call is sufficient, and the added value, if any, of a video call. Consider providing participants with the option to join via phone or video based on their preference.
  - The technological capacity required of participants to complete a phone vs. a video interview.
  - The technological capacity required of participants to engage in a focus group via videoconference, and whether individual phone or video interviews may be better received.
  - Barriers to connecting via videoconference, such as broadband or mobile data coverage and access to a computer or smartphone, and how these barriers may disproportionately affect particular populations who experience health disparities (e.g., rural, low-income populations).
- Many videoconference platforms exist, such as Zoom, WebEx, Skype for Business, and GoToMeetings. Consider the specific features of each when deciding which platform best suits your study's needs. **Before selecting a platform to use, consult with your IRB and IT consultants to ensure your chosen platform adheres to HIPAA and data security requirements.**
  - *This document outlines features available via Zoom, as it is a videoconference platform widely available at UNC Chapel Hill: <https://software.sites.unc.edu/zoom/>. However, the recommendations below can be applied broadly, as many of these features are available with other videoconference software.*
    - *Information about data types permitted in Zoom at UNC Chapel Hill and differences between non-HIPAA and HIPAA-enabled Zoom account is available at <https://safecomputing.unc.edu/it-tool/zoom/>, <https://safecomputing.unc.edu/2020/03/updates-to-zoom-re-sensitive-data/>, and <https://www.med.unc.edu/it/services/video-conferencing/zoom-support/>*
  - *UNC School of Medicine faculty and staff also have access to WebEx: <https://www.med.unc.edu/it/services/video-conferencing/>*

- *Guidance from the UNC Office of Clinical Trials (4/6/20) notes that the UNC School of Medicine WebEx account is HIPAA compliant, but we recommend consulting with IRB / your IT consultant before beginning a project.*
- Take steps to enhance security of videoconference sessions, such as provide participants with a password for joining the call.
  - *Steps study teams can take to enhance security of Zoom calls are listed below.*
    - *Making meetings private*
    - *Waiting until just before the session to share meeting details with participants*
    - *Sending meeting links and information directly to participants (not posting online)*
    - *Using the Waiting Room feature, where the host admits participants to the session: <https://support.zoom.us/hc/en-us/articles/115000332726-Waiting-Room>*
    - *Requiring a password to enter the session: <https://support.zoom.us/hc/en-us/articles/360033559832-Meeting-and-Webinar-Passwords->*
    - *Make sure you know how to dismiss someone from a call in case you experience an attack during your session. Note that if attacks occur, the host can remove the caller from the session. At UNC: Report any issues related to hacking or attacks during Zoom calls to UNC ITS (919-962-HELP)*
- Recording options include using speakerphone (in a private area) and recording with a standard digital recorder, recording directly via phone, attaching a recording device to the phone, recording videoconference or computer-based calls with recording software on your computer, or using a videoconference platform that allows for recording. **Consult with your IRB and IT consultants to ensure your chosen recording method adheres to HIPAA and data security requirements.**
  - If recording directly on a videoconferencing platform, remember:
    - The recording files may include both an audio and a video file. If you do not want a recording of the participant's face, you can ask the participants to call in to teleconference (instead of joining online) or turn off cameras before recording. You can also decide to delete the video file immediately afterwards and only store the audio file.
    - Disable participant recording options for online focus groups to help promote confidentiality.
    - Some video conferencing platforms may have built-in transcription features. You can later review and edit this transcription for your analysis.
    - *For more information on setting up and managing local recording via Zoom, see: <https://support.zoom.us/hc/en-us/articles/201362473-Local-recording>*
- **Practice!** Practice using the technology by having a mock interview or focus group before you begin data collection, and test your recording technology in advance.

## Preparing participants to engage in remote qualitative research activities

- Communicate with participants in advance so they know what to expect when engaging in remote qualitative research activities.
- During the recruitment process:
  - Let participants know if audio/video recording is mandatory (e.g., an online focus group).

- Ask about participant internet access, if that is a requirement to participate. If possible, have a phone option available for those who do not have stable internet access.
- Ask participants to join videoconferences from a secure internet connection (e.g., not public Wi-Fi).
- Ask participants to call from a private location where there will be few interruptions (though be aware that this may be difficult for some participants, such as parents at home with young children).
- If conducting an online focus group, communicate any risks unique to an online environment, such as potential risks to confidentiality (e.g., potential that other participants are not in a private setting).
  - Participants' full names are often displayed when joining the virtual meeting. Consider providing instructions so participants join with first name only, or plan for the meeting host to change their name to first name or pseudonym only upon joining the meeting.
- If using videoconference software, provide participants with tutorials or technical support in advance, including written instructions for joining the videoconference. If possible, allow phone as a backup option. Understand that participants' technological literacy will vary, and be willing and available to answer questions. Some teams will offer to have a practice session with focus group participants in advance, so they can practice using the videoconference software before a focus group.
- Let participants know how compensation will take place (e.g., e-gift card emailed to them after the session).
- Build-in additional time to troubleshoot technological issues the day of the interview/ focus groups. For example, if you anticipate your interview to last 45 minutes, tell the participants to book one full hour.

## Conducting phone or videoconference interviews

- Take the call from a private room with no distractions. If using online software, join from a secure Internet connection (e.g., not public Wi-Fi).
- At the beginning of the call:
  - Introduce yourself and the project (this helps with building rapport, particularly when the participant has not met you in-person).
  - Ask participants if it is a good time to talk; suggest that they find a private place to talk.
  - Remind participants that they can end the interview at any time.
- Let the participant know that you will be taking notes and looking at your interview guide, but that you are attentive to what they are sharing with you.
- Let the participant know when you will begin recording. State the date and time at the beginning of the recording.
- When you and the participant cannot see each other (e.g., via phone interviews), verbal probing and feedback is especially important.
  - Communicate interest and attention verbally, using techniques such as:
    - Verbal probes (e.g., “mmhmm”, “tell me more”)
    - Reflective listening
    - Thanking the participant for sharing their experiences and perspectives
  - Pause and give participants time to respond. If you both speak at the same time, ask them to continue.
- If there is background noise and/or the participant appears distracted, offer to pause the interview while they attend to the issue.

- Videoconference platforms that allow screen sharing can be very helpful for usability testing interviews. For example, you can ask participants to share their screen as they navigate through a website or tool. Note that there can be a steep learning curve with using some of these features – be prepared to walk participants through the process.
  - *Instructions for accessing these feature in Zoom is available here:*  
<https://support.zoom.us/hc/en-us/articles/201362153-Sharing-your-screen>.

## Facilitating remote (videoconference) focus groups

*Note: The literature notes that online focus groups can be conducted synchronously (with everyone present at the same time) or asynchronously (people present at different times, such as responding to questions and comments via online communication (email, social media, etc.) (Abrams & Gaiser, 2017). This guide focuses on synchronous online focus groups.*

*We recommend having a smaller number of participants in virtual focus groups than in-person focus groups (e.g., 4-6 participants per virtual focus group).*

- Join the session from a private room with no distractions. Use a secure Internet connection (e.g., not public Wi-Fi).
- Consider conducting the consenting process individually and in advance, such as during the recruitment call.
- Ensure adequate staffing. Roles include the following:
  - Facilitator
    - Introduces the focus group
    - Facilitates the discussion
    - Monitors to the chat to identify additional discussion points
  - Note taker
    - Takes notes throughout the discussion
    - Monitors the conversation, including the chat, and supports the facilitator by sending ideas for probes via private chat
    - Monitors time and sends reminders to the facilitator via private chat
    - Serves as back-up facilitator in case facilitator experiences technical difficulties
  - Meeting host
    - Sets up and opens the virtual meeting
    - Admits participants from the waiting room
    - Manages the audio/video recording
    - Monitors the chat to identify technical questions that need to be addressed
    - Provides technical support to participants as needed
  - If staff support is limited, the note taker can also serve as the meeting host. However, it is helpful to have separate individuals serving in these roles if possible.
- At the beginning of the session:
  - Welcome participants as they join. If needed, change participant names on the platform so only their first name appears.
  - Offer a brief tutorial on how to use the online platform. Provide instructions for turning participant cameras on or off per their preference.
  - Introduce the study team members present. After introductions, team members who are not facilitating the focus group (e.g., note taker, tech support) might consider turning off their cameras to help reduce distraction.

- Go over ground rules, including how to take turns speaking.
- Remind participants about the importance of confidentiality. Ask that they participate from a private room. Ask that they do not record the session.
- Let participants know when you will begin recording. State the date and time at the beginning of the recording.
- Initiate the discussion with introductions (first name only) and an icebreaker question.
  - Icebreaker questions are short, easy to answer questions that can help get the conversation moving. It can be helpful to ask an icebreaker that is somewhat related to the study topic (e.g., “Why were you interested in participating in this focus group?”), though some teams prefer to start with something fun (e.g., “What is your favorite dessert?”)
- Pay attention to who is speaking and provide opportunities for all participants to share. If some participants are more active than others, ask, “Would someone who hasn’t shared yet like to speak?”
- Teleconferencing software often provides a variety of features for managing participant interactions during a group meeting. Familiarize yourself with these features ahead of time.
  - *Information on managing participants in Zoom can be found at:*  
<https://support.zoom.us/hc/en-us/articles/115005759423-Managing-participants-in-a-meeting>
- Consider whether using videoconference tools would support your discussion. Note that for participants new to videoconference technology, these tools may be a distraction or barrier to participation.
  - Examples of these tools in Zoom and ideas for their use include:
    - Whiteboard -- <https://support.zoom.us/hc/en-us/articles/205677665-Sharing-a-whiteboard>
      - Summarizing: Record participant responses on the white board and ask them to confirm or discuss.
      - Brainstorming: Ask participants to write responses directly on the whiteboard.
    - Screen share - <https://support.zoom.us/hc/en-us/articles/201362153-Sharing-your-screen>
      - Share materials and ask participants to react/provide feedback.
      - Demo a website or tool and ask participants to provide feedback.
    - Poll - <https://support.zoom.us/hc/en-us/articles/213756303-Polling-for-Meetings>
      - Collect demographic information.
      - Solicit initial reactions to a question and then discuss responses.
    - Meeting reactions - <https://support.zoom.us/hc/en-us/articles/115001286183-Non-verbal-feedback-and-reactions->
      - Ask participants to indicate agreement or disagreement using the thumbs up/ thumbs down feature.
    - Chat - <https://support.zoom.us/hc/en-us/articles/203650445-In-Meeting-Chat>
      - Ask participants to write responses to a question via chat, followed by discussion. Save the chat thread to refer to after the session.
      - Troubleshoot individual technical issues via chat.

## NC TraCS Qualitative Research Specialists are here to help!

We offer free consultations and are available to help you navigate remote qualitative data collection.

### Examples of ways we can assist include:

- Working with your team to plan remote data collection activities
- Reviewing interview and focus group guides
- Reviewing participant information sheets
- Participating in and providing feedback on a mock remote interview
- Observing and providing feedback on a mock focus group session
- Providing tutorials on using videoconference features to assist with data collection
- Assisting in designing videoconference platform tutorial materials for your population
- Helping problem solve issues that arise during study implementation
- Coaching your team in conducting remote data collection sessions

**Contact us for a consultation** by emailing [engagement.nctracs@unc.edu](mailto:engagement.nctracs@unc.edu), or submit a request at <https://tracs.unc.edu/consultation>. **We are able to support qualitative research studies in both Spanish and English.**

Learn more about our services at <https://tracs.unc.edu/engagement/qualitative-research-services>

## Appendix A: Sample Information Sheet Template

### Information Sheet: [Study Name]

#### **Who is conducting this research study?**

[List PI name(s), department, and institution.]

#### **What is this research study about?**

[Provide an overview of the research study, eligibility criteria, and basic activities involved.]

#### **What will I be asked to do?**

[Outline the activities involved, including the time required to participate, topics covered during interviews/focus groups, and whether audio or video recording is required or optional.]

#### **Participation is voluntary**

[Sample language: *Participating in this interview is voluntary, and there is no penalty for refusing to participate. If you decide to participate, you can end the interview/leave the focus group at any time.*]

#### **What are the risks and benefits of participating?**

[Discuss risks and benefits of participating. Outline risks unique to remote data collection, such as video recording, and strategies to protect confidentiality and any limitations (e.g., cannot guarantee other focus group participants will keep information confidential). Discuss who will have access to audio/video recordings and how they will be stored.]

#### **What are the costs of participating?**

[Outline costs participants may incur, such as costs of a phone call or Internet usage.]

#### **Will I be compensated for participating?**

[Outline compensation/incentives and how they will be provided to the participant.]

#### **Who can I contact with questions or concerns?**

[Include contact information for PI and/or study coordinator, as well as IRB information.]

Sample IRB information language: *All research on human volunteers is reviewed by a committee that works to protect your rights and welfare. If you have questions or concerns about your rights as a research subject, or if you would like to obtain information or offer input, you may contact the Institutional Review Board at [phone] or by email at [email address]. The IRB number for this study is [number].*



## Appendix B: Sample Verbal Consent Script

Did you receive and have a chance to read the information sheet about the study?

[If no] Ok, we are required to provide this information before the interview/focus group. I will be reading from the document, but please feel free to stop me if you have any questions. [Read information sheet aloud]

[If yes] Ok, I would like to remind you that participating in this interview/focus group is voluntary, there are no penalties for refusing to participate, and you can end the interview/leave the focus group at any time. [Include any other important reminders here.]

Do you have any questions? [Answer questions]

Do you agree to participate in this interview/focus group? [If yes, continue. If no, stop now]

[If applicable] Do you agree for the interview/focus group to be audio/video recorded? [If yes, may record. If no, do not record or end participation if recording is required.]

## Appendix C: Sample Virtual Focus Group Introduction Script

*As participants enter the virtual meeting room, meeting host will change their name so only their first name appears.*

Thank you for participating in today's focus group! Before we get started, I'd like to take a few minutes to introduce ourselves and provide some guidelines for our discussion today.

As you likely recall, the purpose of this project is [give overview of study and how the information will be used.] My name is [name], and I am a member of the project team at [institution, department]. I will be facilitating today's focus group. Joining me are [introduce other team members and their roles during the focus group (e.g., notetaking, available to help with technical concerns)].

I'd like to give a few reminders about using [videoconference platform]. Please note that you can mute and unmute yourself as needed. You can also turn your cameras on and off, though we would appreciate it if you would keep your cameras on if you are comfortable doing so. Does anyone have any questions about using [videoconference platform]?

Next, I'd like to give a few ground rules for our discussion.

- We are interested in hearing all of your thoughts and opinions; please know that it is ok to agree or disagree, though it is important to be respectful towards everyone here.
- We'd like everyone to have a chance to speak. If you've been speaking a lot, consider stepping back and letting others share. If you haven't spoken recently, please consider speaking up and sharing your thoughts. Because I want to make sure that everyone has a chance to contribute, I may call on you by name. However, you are always free to decline and you do not have to answer any questions.
- I'd also like to ask for your help in protecting the privacy of everyone here today. Please sit in a quiet, private location; feel free to move now if necessary. Please address others by first name only, and do not record today's discussion. Please do not share other participants' comments outside of this focus group. However, we cannot guarantee that other participants will keep what you say confidential, so please only share information you are comfortable sharing.
- Finally, we want this to be a discussion, so please also feel free to respond directly to other participants. You do not need to wait for me to call on you.

As you likely read in the information sheet, we will be audio and video recording today's discussion so that we can transcribe, or write out, the conversation for analysis. The audio and video files will be saved [describe how files will be saved]. The audio files will also be shared with the transcription company. We will delete the audio and video recordings [after transcription/after the study is completed]. We will not include names of any study participants in reports or presentations about the focus groups.

Does anyone have any questions?

Does anyone have any objections to starting the recording now? [If no] we are now recording today's conversation.

## Appendix D: Additional Resources on Remote Qualitative Data Collection

Abrams, K. & Gaiser, T. (2017). Online focus groups. In N. Fielding, R. Lee & G. Blank *The SAGE Handbook of online research methods* (pp. 435-449). 55 City Road, London: SAGE Publications Ltd doi: 10.4135/9781473957992.n25

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Last updated: 05/10/2021

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