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Transforming Qualitative Interviewing Techniques for Video Conferencing Platforms

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ABSTRACT

This paper points out the main opportunities and challenges when qualitative data collection (both in-depth interviews and focus groups) is transferred from an in-person setting to a video conferencing platform. Online video research interviews (OVRI) permit an overcoming of limitations in in-person interviews such as access to participants, time, expense, and a potential impact of the researcher's physical presence during data collection on the subjects' responses. The most prominent challenges regarding the quality of OVRI are: building rapport and restricted visual cues, turn-taking, participant activation through exercises and participant validation. In this article we offer advice on how to solve these challenges.


KEYWORDS

Qualitative interviewing; video conferencing platforms; digital; journalism; communication

Advancing Method Summary

- *Description of method:* The OVRI approach makes implicit how a synchronous qualitative data collection method using online video conferencing platforms can be successful when interviewing techniques are adapted to fit the digital platform.
- *Aim:* The main aim of the approach is to meet participants wherever they are at the moment of the interview and allow them to report on their user perceptions via video conferencing platforms.
- *Data material:* Data collected via this approach consists of the recorded interview data and material generated during the interview (e.g. outcome of exercises with brainstorm whiteboards or textual material).
- *Main contribution:* By employing online video conferencing platforms, it is possible to design a qualitative study that allows a collection of rich and thick data, an access to all shared data, an ease of sharing stimulus material, and get access to hard-to-reach demographics. This article shows how qualitative interviewing techniques can be adapted to video conferencing platforms. According to the literature and experiences from conducting qualitative interviews on a video conferencing

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platform the most prominent challenges regarding the quality of the interview, is building rapport and restricted visual cues. Apart from that we found that turn-taking, participant activation through exercises and participant validation are important to transform to conduct a high-quality interview on a video conferencing platform.

- *Advantages:* The main advantage of the OVRI approach is the convenience of the data collection process for both researcher and participants. Advantages for researchers include a time-saving and easy audio and visual data collection process.
- *Challenges:* Challenges for researchers include a lower number of participants in group discussions, potential participants' reluctance to share their personal space, and shorter time for data collection compared to in-person interviewing. Additionally, it is necessary to adapt qualitative interviewing techniques and consider possible technical limitations. Moreover, established video conferencing platforms are part of privately owned companies, generating questions about data security.
- *Fields of application:* The OVRI approach is feasible for all interview-based data collection in scientific fields which are highly influenced by digitalization, such as communication, media and journalism research. Here, all conceptualising elements of production, dissemination and reception are digitalised, and therefore enables or even necessitates digital methodological frameworks.

Introduction

With the ever-growing digital societies, people have become familiar with various online platforms and applications to convey at least some of their daily interactions and communication online. Video conferencing platforms such as Zoom, Google Meet and Microsoft Teams enable online meetings, chats, calls, screen sharing and file sharing. The use of video conferencing platforms boomed in 2020 due to the massive rise in remote working forced upon businesses by the COVID-19 pandemic. Therefore, all these platforms have grown massively (Hughes 2020) and become an essential part of everyday life, enabling users to be connected. Therefore, we assume that people's digital skills and competences using video conferencing platforms have grown accordingly.

At the same time, the use of technology in research is not new, and digital research methods have been evaluated and discussed since the 1990s (e.g. Sellen, 1995), with the number of studies increasing from around the 2000s and onwards (Thunberg and Arnell 2021). Online technologies are being used for both quantitative (surveys) and qualitative (in-depth interviews and focus groups) studies on audiences' use of journalism, media, and communication (Lobe & Morgan, 2021). One of the main advantages of using video conferencing platforms as means of data collection is that it allows meeting participants wherever they are. It resonates well with audience researchers' call for apprehending user situations, experiences, needs and preferences in spaces of the daily routine (Dimmick, Feaster, & Hoplamazian, 2011). Meijer & Kormelink (2018) underline that future research into news audiences must take a user experience as point of departure, and they continue by emphasizing: "New user-centered research

methods and concepts are needed if journalism and journalism studies want to continue to be able to grasp and make sense of news audiences.” (Meijer & Kormelink, 2018, p. 6). As journalism, media and communication studies scholars continue to use the interviewing method, the data collection process will evolve based on the types of questions asked as well as the types of technology available. Interviewing as a technique of data collection has been called a craft (Kvale and Brinkmann 2015), and the quality of the interview relies heavily on the quality of the interviewer (Morse and Field 1985). Consequently, qualitative interviewers must continuously reflect on how interview techniques can be developed and update their skills to overcome drawbacks of qualitative interviews, such as limited access to participants, a reliance on respondents’ accuracy and their intensity in terms of time, expense, and possible emotional strain (Berg, 2007).

In this article, we offer a strategy of adopting the Online Video Research Interviewing (OVRI) approach for the purpose of scientific projects in communication using video conferencing platforms. We argue that using established video conferencing platforms for data collection is highly relevant for communication scholars, since many people have grown accustomed to handling these. Yet, when conducting OVRI, it is obvious that traditional ways of conducting a qualitative interview must be reconsidered to fit video conferencing platforms. In our paper we focus on the interviewer’s perspective and only discuss those aspects of the interviewee’s perspective that directly affects the research approach.

The structure of the paper is first, a presentation of advantages of using video conferencing platforms for capturing user perceptions of journalism, media and communication. Second, based on the literature review and fieldwork, we discuss how the OVRI approach can be utilized in future studies.

Qualitative Interviews Using Video Conferencing Platforms in Digital Communication

In-person face-to-face interviews and focus groups are the traditional forms of generating data in qualitative studies (Creswell 2013). However, in the last four decades there has been several innovations with regards to how those studies have been conducted. Since the 1990s much attention was paid to the use of phones in data collection (Barribal et al., 1996; Carr & Worth, 2001; Novick, 2008). While telephone interviews have been used extensively in quantitative research (Barribal et al., 1996; Carr & Worth, 2001), they tend to be perceived as a less attractive alternative to face-to-face qualitative interviews (Novick, 2008) which are the ‘gold standard’ (McCoyd & Kerson, 2006). Reported drawbacks of telephone interviews include limited coverage in certain participants, lower response rates, limited duration, a reduction in coverage of themes, less detailed answers, a potential distraction of participants by activities in their environment, a greater proportion of the time spent on the researcher’s talk than in face-to-face interactions (for literature review see Novick, 2008; Irvine, 2011). Still, first and foremost, the limitation of telephone interviews is the absence of visual cues that is said to have several effects including the loss of informal communication and contextual information, as well as a misinterpretation of responses due to a loss of

nonverbal data, which include facial expressions and body language (Irvine, Drew, & Sainsbury, 2013).

Nevertheless, telephone interviews allow to decrease costs and travel, provide an ability to reach geographically dispersed respondents and to oversee interviews, as well as to enhance interviewer safety (Novick, 2008). Furthermore, telephone interviews seem to provide favorable conditions for addressing potentially 'difficult' or sensitive topics since they offer a relative anonymity (Carr & Worth, 2001; Trier-Bieniek, 2012).

With a recent development of technology, video conferencing seems to provide researchers and participants with a convenient alternative due to several reasons (Gray et al. 2020; Lobe & Morgan, 2021). Similar to telephone interviews, video conferencing allows saving costs (Deakin and Wakefield 2014), gaining access to larger and more diverse populations (Deakin and Wakefield 2014; Sedgwick and Spiers 2009), interviewing more participants in a shorter amount of time by eliminating travel (Winiarska 2017), reaching hard to get demographics and to reduce unpredictable circumstances, such as poor weather conditions, that would deter participants meeting in person (Sedgwick and Spiers 2009). At the same time, online video conferencing platforms – in contrast to telephone – provide an opportunity to collect both sound and image. Therefore, the main limitation of the telephone interviewing is diminished, since researchers may collect high-quality data from both verbal and nonverbal cues.

Researchers and participants can connect to their chosen platform (for an overview of different platforms see [Lobe, Morgan, & Hoffman, 2020]) using their computer, mobile telephone or tablet. Although many studies using video conferencing platforms reported either technical problems or fear of technical problems related to the risk of loss of internet connection or lags (e.g. Jenner and Myers 2019; Sipes, Roberts, and Mullan 2022; Weller 2017), many technological obstacles have been solved as the technology has matured. Also, since the platforms have recently become fully integrated into many users' daily routines, concerns on how much experience the researchers and participants have with the platform (e.g. Archibald et al. 2019; Thunberg and Arnell 2021) have been reduced.

A recent literature review by Thunberg and Arnell (2021) on using video conferencing platforms in scientific research underlines that there seems to be little or no difference between it and in-person interviews (Namey et al. 2020; Sedgwick and Spiers 2009). As long as the technology works as planned, conducting interviews with audio/visual software seems to be a good option (Thunberg and Arnell 2021). In addition, industry market researchers claim that using video conferencing platforms to collect qualitative data is "faster and more agile process: Although online focus groups are not necessarily less costly to implement, we have learned that we can mobilize and deliver insights faster. It is easier to recruit and less time consuming to implement online groups. Both for the participants and moderator." (author's translation from Danish) (Epinion, 2021).

Some researchers state that interviews using video conferencing platforms are better, as the participants feel more relaxed and at ease when they can participate in a more flexible setting and do not have to meet a stranger for an interview, and this can make them feel more comfortable disclosing their experiences (Sipes, Roberts, and

Mullan 2022; Weller 2017). Indeed, literature suggests that overall, participants report that video conferencing is a positive experience. They identify strengths such as: convenience and ease of use, enhanced personal interface to discuss personal topics, timesaving with no travel requirements to participate in the research and therefore more time available for their family (Gray et al. 2020).

Thus, research has established that data collection via online video conferencing platforms gather rich data along with positive participant experiences. This offers support to an optimistic outlook for the use of video conferencing platforms as a method of data generation in qualitative interviewing, and also that a digital option for interviewing is essential to stay relevant in an ever-changing digital era (Gray et al. 2020).

However, digital interviews using video conferencing platforms can be understood as a new medium, still developing its norms. Even though some researchers successfully employed video conferencing platforms, it is important to bear in mind that although online options might offer the same or similar quality as in-person options, they are a different type of interview that requires different preparations to reduce the risk of adverse effects on quality (Thunberg and Arnell 2021). Therefore, we describe how traditional interviewing techniques must be developed to fit video conferencing platforms and to secure high-quality qualitative interviews and rich data.

Methodological Recommendations: Lessons Learnt on Interviewing Technique from Fieldwork

Fieldwork

In this article, experiences from conducting three empirical journalism studies are used to explore how in-person synchronous qualitative interviewing techniques can be transformed to fit digital data collection. We conducted both in-depth and group interviews and focus on their similarities rather than differences. An overview of the studies is displayed in Table 1 (see [appendice 1](#)). In the following sections, we will confront claims from other scholars with findings from our studies to either support previous observations or to offer alternative solutions to challenges in OVRI.

Methodological Decisions Made before Conducting the Interviews

The pre-interview phase of the study is principally concerned with deciding on who will be interviewed, how many persons will participate in focus group discussions, and what will be a duration of these discussions. Lobe et al.s (2020) stated that while in-person face-to-face focus groups usually work well with anywhere between 4 and 10 participants, online focus groups call for a lower number, ideally 3–5. Our studies confirmed a high level of effectiveness considering data collection of video-based discussions in groups of 4-5 participants. For reflections on GDPR (see [appendice 2](#)).

Regarding the duration of an OVRI, industry players recommend not exceeding 1 ½ hours (Epinion, 2021), since participants in online interviews seem to run out of energy more quickly than in in-person interviews. This observation supports previous considerations on limitations of the use of phones in interviewing, namely a 20 to 30 min-attention and engagement span (Carr & Worth, 2001). During the COVID-19

pandemic many people referred to an experience of 'Zoom or Teams fatigue' after extensive online platform use. Therefore, we recommend the OVRI to be shorter than in-person interviews, and it should not exceed 60 min.

The most prominent pre-interview aspects of transforming in-person interviews to an OVRI are to secure the technical and practical feasibility on both the participant side and the interviewer side. Gray et al.s (2020) offered a comprehensive technical 10-point list of what to think about when conducting audio/visual digital interviews using Zoom, such as providing technical information and a direct link to the meeting, having a back-up plan, using a stable internet connection (not a wireless connection), and considering the storage needs for the recordings. In addition to this list, we recommend using a combination of telephone contact with online communication. In the studies that served as a fieldwork here, the invitations, collection of consent (replying to an email) and communication around scheduling of the interviews were done via email, while prompts were sent to participants' mobile phone.

Based on others' positive experiences (Thunberg and Arnell 2021), participants were encouraged to sit in a confidential, comfortable setting, free from any potential disruptions and noise and have drinks and food available if needed. Furthermore, to secure a high-quality environment for the interview and ensure the best conditions for the interview/group discussion we made a request to minimize disturbing factors, such as shutting down other applications and social media sites, and silencing phones. In addition, participants were encouraged to avoid participating from mobile devices with small screens, because it is difficult to see to the windows with the other participants and to write and annotate.

Although online video platforms provide an opportunity to share both audio and visual messages, participants might be reluctant to share the image, either a personal one or a view of setting they are staying in during the interview (Edwards & Holland, 2020). Since the access to visual cues is of high significance in qualitative interviewing, we asked participants to have their sound and camera turned on during the entire interview. Still, they could blur or change the background to keep the setting private.

Lastly, we learned that the interviewer's comfort level with technology has an influence on the ability to build rapport, hence, it is imperative for the interviewer to familiarize with the platform chosen regarding screen sharing, data recording and annotation tools.

Strategies and Techniques Used during the Online Interviews

According to the literature, the most prominent challenges regarding the quality of the interview, is building rapport and restricted visual cues (Thunberg and Arnell 2021). Apart from that, we argue that turn-taking, activating participants through exercises, and participant validation are important to transform to conduct a high-quality OVRI. Below, these aspects are discussed in turn:

Building Rapport

Building rapport is crucial during an interview because it enables the participants to provide a rich and detailed account of the experiences at the heart of the study.

Hence, in the literature much attention has been paid to limitations caused using technology (Barribal et al., 1996; Carr & Worth, 2001; Lobe & Morgan, 2021). While using either telephone or online platforms, an interviewer does not have the same opportunities to create security with one's mere presence (e.g. gestures, welcoming smiles, etc.) as during in-person communication. Therefore, following previous studies (Gray et al. 2020; McGrath, Palmgren, and Liljedahl 2019; Seitz, 2016), we argue that in OVRIs it is just as (or even more) important as in in-person interviews to build rapport in a sense of proximity, trust, and security. To achieve this goal in the pre-interview stage, Deakin and Wakefield (2014) suggest exchanging several emails preceding the video conferencing interview to help build rapport, a recommendation we support. Seitz (2016) argues that trying out the technology together with a participant can also help building a relationship between the researcher and the participant, making the interview situation more relaxed. In our experience, this is also the case, since we had good experiences trying out the Zoom Whiteboard together with participants, as they entered the interview.

Moreover, we advise to extensively small talk with participants as they arrive and to plan a simple icebreaker exercise. In our studies, we chose a very simple online ice-breaking exercise to engage participants, merely asking participants to state which city/area they participated from, and to describe their favorite time of day listening to radio news. These questions can be answered briefly or thoroughly, as a participant wishes. In both cases it gives the interviewer (and the rest of the group) a sense of getting to know one another. Clearly, one can be more ambitious and use high-demand ice breakers, for example make participants fetch a thing from their home which describes their way of consuming news within 60s. The challenge of such an activity is that participants might not want to participate and share, and then the engagement and good spirit is ruined. Therefore, the goal is not to find the most creative high-demand virtual icebreaker, but the one which will succeed in easing the tension and establishing proximity in an online setting. Our recommendation is to choose an easy-to-participate icebreaker exercise which makes it possible for participants to tell something about themselves in relation to the interviewer's research question.

Nonverbal Communication Cues

Despite their advantage over a telephone interview in providing an access to non-verbal cues, video online platforms have their limitations. Regardless of the quality of the online connection and the type of online platform used, it is hard to see the participant's subtle facial expressions (micro expressions) and/or body language. In most cases the camera will only be able to capture the head and some of the upper body, meaning that visual cues in the form of body language can still be missed.

One of the things we experienced while conducting OVRIs was the issue of establishing eye contact and decoding body language. How you use your eyes and where you look is vital to creating presence. Generally, when talking on online video conferencing platforms it is recommended to look into the camera, because then participants on the other side of the screen will experience direct eye contact. Unfortunately, the downside is that when looking in the camera one cannot see the

participants, and consequently one misses participant feedback: Are they listening? Did they understand the question? Do they agree/disagree? etc.

Consequently, as an interviewer, to stay in touch and feel the participants, it is important to look at the participants and not in the camera. We recommend, from time to time to look into the camera to create the illusion of eye contact, i.e. when asking questions or rounding up, but the most important thing is to sense participants on the other side of the screen, and it can only be done by looking at the participants. An important piece of advice is to always avoid looking at yourself on the screen while talking, it will seem like your attention is elsewhere. Besides, be sure to position the Web camera and monitor at eye level, so it is possible to look into the camera and simulate eye-to-eye connection with participants.

In personal communication, when people talk to each other physically, they consciously and subconsciously use indicators of whether they are listening, e.g. conversational gambits. In the online face-to-face communication, the affirmative gambits do not work as usual. Sometimes because of turned off microphones, and sometimes because there are delays in the sound which interrupt the flow of the conversation and makes the conversation staccato-like and can cause participants and interviewer to hold back. Therefore, we experienced that it is an advantage for the interviewer to display active listening and enhance the dialogical communication by increasing the bodily and facial expressions, e.g. smile more and preferably more exaggerated, and amplify nodding in the affirmative instead of saying "mmm" and "yes". Furthermore, body language is useful. For example, using thumbs up when you understand or think something is good. Gestures, symbols, icons and signs which are culturally appropriate are very useful instead of interrupting by saying "yes", "ok" etc. And of course, wave when you say hello and goodbye. Rounding off a discussion is also more difficult in OVRIs, because you cannot use body language as clearly on a screen. Our solution to this challenge is to use body language more actively and physically raising a hand, as a sign of wanting to stop the conversation.

In our interviews, participants were encouraged to have their sound and camera turned on during the entire interview, not use the 'raise hand' button and to be polite, and let others finish speaking before beginning to talk. There are advantages and disadvantages of these ground rules. The advantage is that the conversation runs more smoothly if the raised hands are avoided. On the other hand, it can be harder for the moderator to decode, if a participant wishes to speak, if one can only rely on visual clues. Consequently, in some interviews, especially if there are many participants in the interview, it can be an advantage to use the digital 'raise hand' functionality.

Turn-Taking

Another important lesson learnt regarding interviewing techniques is how turn-taking is altered online. According to Sacks, Schegloff, and Jefferson (1978) there are three ways in which speakers can gain the speech turn in multi-party talk: They can take the turn at a transition relevance place (TRP) (i.e. a prior speaker ends their turn); they can overlap with another speaker's turn (i.e. interrupt), or they can be allocated the turn by a prior speaker (i.e. they are nominated by a facilitator). These basic dynamics are crucial in determining how turn-taking occurs and whose turn it is, and the speed at

which this happens is quick and automatic, and therefore, we rarely realize it happening. Unfortunately, these basic dynamics are challenged on video conferencing platforms.

Conferring our experiences, the main challenge lies in TRP and overlapping, because it is hard to clearly communicate and understand that it is someone else's turn when non-verbal cues are less visible. Consequently, the interviewer must take a more active role in facilitating turn-taking, e.g. Actively giving the turn to participants, lining up an order of turns before discussing an issue or simply, waiting allowing for silence to act as a catalyst for a participant to drive the conversation forward. By designating a specific participant to respond to a question or comment, one is forcing them to take a turn, even if that turn is to simply refuse to answer (such as saying "I don't have anything to add"). This is also, the reason why we recommend participants to avoid muting, because it unnecessarily complicates the flow of turn-taking. We recommend, the interviewer to vary the turn-taking techniques to facilitate a natural conversation in OVRIs. One way of doing this, is to pose a question, then give participants 30s to think, and before the 30s begin state a list of speakers. Another way is to let participants from one region speak first, and a third, to ask participants to answer in alphabetical order.

Participant Activation through Exercises

To activate participants during the OVRI, we shared stimulus material, such as (audio)-visuals and the whiteboard in Zoom to co-create and brainstorm. When brainstorming the participants used the annotation tool where it is possible to write, rank and sort the ideas and add stars and hearts, if you support an idea. In addition, we used empty matrices in co-creating exercises where participants wrote their suggestions in the matrix. In our case they wrote preferred characteristics of TV and radio hosts in a matrix with headlines such as: knowledge, personality, dissemination and skills (on the x-axis) and types of hosts, such as news anchor, expert host and live show host (on the y-axis).

Participant Validation Techniques

As part of ensuring trustworthiness in OVRIs, participant validation (Creswell 2013; Kvale 1989), also known as member checking, is of increased importance. Issues of participant validation also involves sharing (anonymous) collected data often in the form of a draft report with research participants and receiving their feedback, but here we focus on validation during the interview. It is our recommendation to increase the focus on participant validation and to make it function as a sounding board and a way of checking that the interviewer has correctly understood the reported responses of the participants, especially when it comes to picking up subtleties such as irony, emotions, silences, or other gestures (McGrath, Palmgren, and Liljedahl 2019). During the OVRIs, we realized that it is sometimes beneficial to ask e.g. 'Why are you smiling?', because in certain instances, it is not possible to determine if participants smile at something being said in the interview, or if it something happening in their home that the interviewer is not aware of causing a participant to smile.

Conclusion

In this article, we point out the main opportunities and challenges when qualitative data collection (both in-depth interviews and focus groups) is transferred from an in-person setting to a video conferencing platform. We may argue that video platforms offer all benefits previously associated with telephone interviews (Irvine, 2011; Novick, 2008), and one more important opportunity: access to the visual component. Using video platforms permits an overcoming of limitations in in-person interviews such as access to participants, time, expense, and a potential impact of the researcher's physical presence during data gathering on the subjects' responses. Furthermore, since the camera can be either turned on or off, participants gain more control over their anonymity, resulting in more honest and rich data on sensitive topics (Irvine et al. 2013; Trier-Bieniek, 2012).

The most prominent challenges regarding the quality of OVRI are: building rapport and restricted visual cues (Thunberg and Arnell 2021), alongside with turn-taking, participant activation through exercises and participant validation. The fieldwork revealed that the interviewer's comfort level with technology is fundamental, since it has an influence on the ability to build a sense of proximity, trust and security. Hence, it is advised to pay more attention to activities strengthening bonding in the pre-interview phase in OVRIs. Although, video platforms offer access to visual cues, it is limited, thus, turn-taking in OVRI requires using more expressive non-verbal communication and verbal messages than in-person interviews. Using active exercises in OVRI requires offering very clear guidelines, because participants may not be familiar with the interactive tools of the online platforms. Finally, in OVRIs validation procedures, a researcher needs to consider the context of the interview.

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