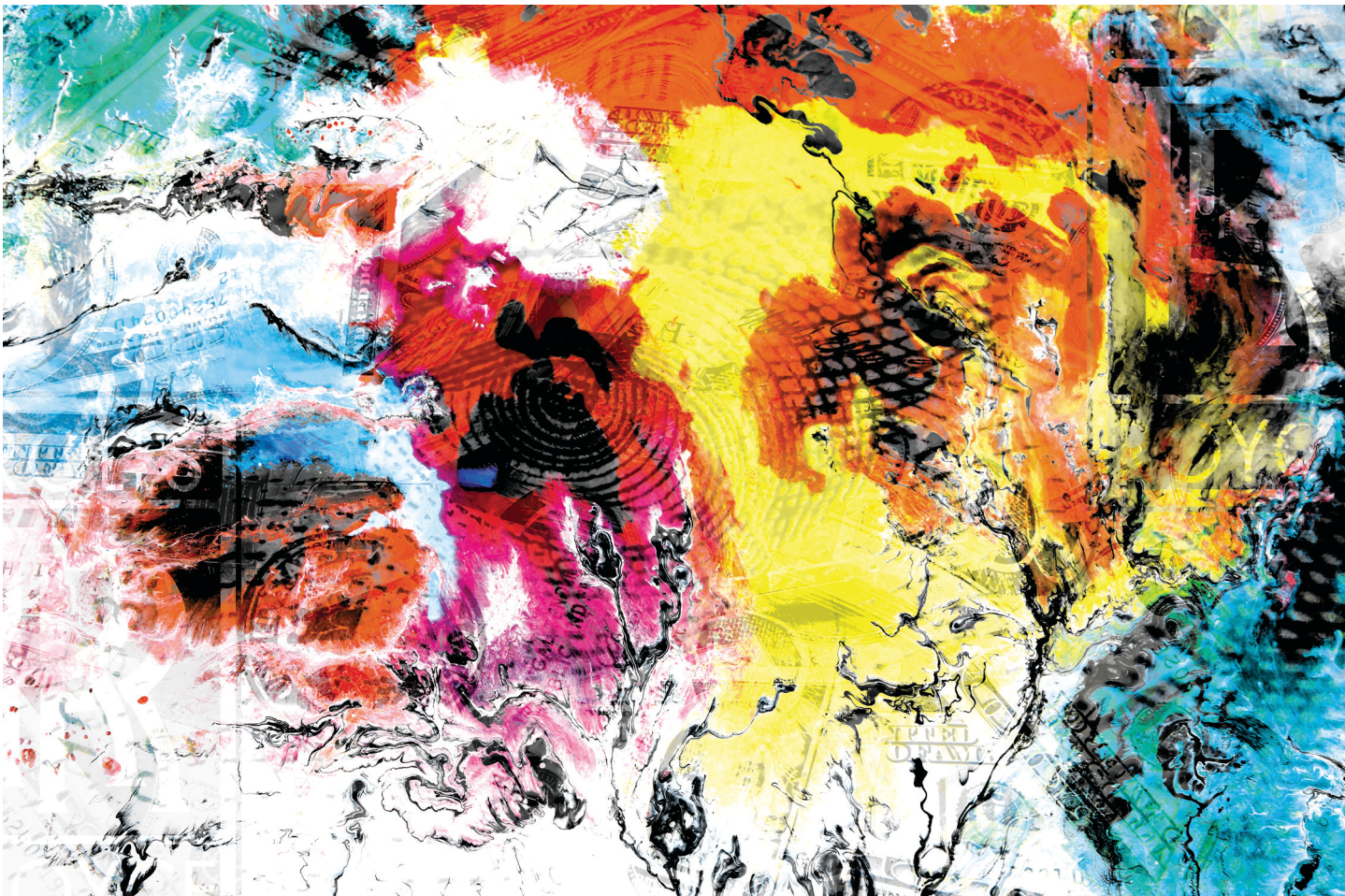


Conducting qualitative interviews: an introduction



This item contains selected online content. It is for use alongside, not as a replacement for the module website, which is the primary study format and contains activities and resources that cannot be replicated in the printed versions.

About this free course

This free course is an adapted extract from the Open University course .

This version of the content may include video, images and interactive content that may not be optimised for your device.

You can experience this free course as it was originally designed on OpenLearn, the home of free learning from The Open University –

There you'll also be able to track your progress via your activity record, which you can use to demonstrate your learning.

Copyright © 2023 The Open University, all rights reserved.

Intellectual property

Unless otherwise stated, this resource is released under the terms of the Creative Commons Licence v4.0 http://creativecommons.org/licenses/by-nc-sa/4.0/deed.en_GB. Within that The Open University interprets this licence in the following way:

www.open.edu/openlearn/about-openlearn/frequently-asked-questions-on-openlearn. Copyright and rights falling outside the terms of the Creative Commons Licence are retained or controlled by The Open University. Please read the full text before using any of the content.

We believe the primary barrier to accessing high-quality educational experiences is cost, which is why we aim to publish as much free content as possible under an open licence. If it proves difficult to release content under our preferred Creative Commons licence (e.g. because we can't afford or gain the clearances or find suitable alternatives), we will still release the materials for free under a personal end-user licence.

This is because the learning experience will always be the same high quality offering and that should always be seen as positive – even if at times the licensing is different to Creative Commons.

When using the content you must attribute us (The Open University) (the OU) and any identified author in accordance with the terms of the Creative Commons Licence.

The Acknowledgements section is used to list, amongst other things, third party (Proprietary), licensed content which is not subject to Creative Commons licensing. Proprietary content must be used (retained) intact and in context to the content at all times.

The Acknowledgements section is also used to bring to your attention any other Special Restrictions which may apply to the content. For example there may be times when the Creative Commons Non-Commercial Sharealike licence does not apply to any of the content even if owned by us (The Open University). In these instances, unless stated otherwise, the content may be used for personal and non-commercial use.

We have also identified as Proprietary other material included in the content which is not subject to Creative Commons Licence. These are OU logos, trading names and may extend to certain photographic and video images and sound recordings and any other material as may be brought to your attention.

Unauthorised use of any of the content may constitute a breach of the terms and conditions and/or intellectual property laws.

We reserve the right to alter, amend or bring to an end any terms and conditions provided here without notice.

All rights falling outside the terms of the Creative Commons licence are retained or controlled by The Open University.

Head of Intellectual Property, The Open University

Contents

Introduction	5
Learning outcomes	6
1 Why use qualitative interviews?	7
1.1 When are qualitative interviews useful?	7
2 Preparing for a qualitative interview	9
2.1 Ethical considerations	9
2.2 Creating interview materials	10
2.3 Setting up the interview	11
2.4 Equipment and practicalities	12
2.5 Pre-interview check	13
3 Conducting interviews	15
3.1 Asking questions	15
3.2 Ongoing consent	17
3.3 Dealing with distress	17
3.4 Ending the interview	18
4 After the interview	20
4.1 Making reflective fieldnotes	20
4.2 Uploading and sending files	21
4.3 Storing data	21
4.4 Anonymisation options	21
4.5 Feeding back to interviewees	26
Conclusion	27
Acknowledgements	28

Introduction

Do you want to find out what people think about an issue, or what their experiences are? Do you need to carry out interviews with people? This course will introduce you to some of the reasons why we use qualitative interviews, exploring how they may enhance other research techniques.

Learning outcomes

After studying this course, you should be able to:

- understand the key skills required to conduct a basic qualitative interview
- prepare effectively before conducting a qualitative interview
- consider some of the ethical issues that can occur during qualitative research
- think of some possible strategies for dealing with ethical issues
- know where to seek further advice and guidance about data management.

1 Why use qualitative interviews?

Qualitative interviews are a conversation between a researcher and an interviewee. They are a useful method for finding out about people's experiences or their views and can be used in a variety of situations to explore lots of different topics. The one-to-one nature of an interview makes it a good way to explore topics that might be personal or sensitive.

In qualitative interviews, researchers can adapt their questions to suit each interviewee because the questions don't have to be asked using the exact same words each time. This flexibility in questioning means researchers can also use qualitative interviews to explore areas where each individual interviewee has something interesting to say.

For example, in discussing contraceptive experiences, Reproductive Bodylore peer researchers asked people who had experience of taking daily contraceptives whether they had ways for remembering to take their contraceptive. However, for interviewees who used longer-acting contraceptives researchers asked whether they had methods for remembering to schedule medical appointments related to those.

1.1 When are qualitative interviews useful?

Qualitative interviews can be used on their own or in combination with other methods. Sometimes, the researcher will know the questions they want to ask, and will not need numerical or representative data. For example, in the Reproductive Bodylore project, we wanted to ask people about their knowledge and experiences of contraception. In this situation, it may be most appropriate to use qualitative interviews as the only method to explore a topic.

In other cases, qualitative interviews may be used alongside quantitative methods, such as surveys. If the researcher knows the general area they want to gather data about, but:

- the area is too broad
- it is unclear what issues are most important to people
- it isn't clear what questions should be asked, or how they should be phrased.

They might want to ask a few people from a group (or research population) some questions to narrow down the right questions to ask a larger group of people. In this case, qualitative interviews would be carried out first, and the data would inform the design of a second, quantitative stage of the research.

In other cases, researchers may have gathered some quantitative data, such as survey results, or the analysis of a set of records, but may want to understand the reasons for patterns they've found in the data. In this case, qualitative interviews might be used with a smaller group (or sample) who are recruited from the research population. Asking this group questions about their experiences or opinions may help the researcher interpret the data they have gathered in the first stage of the research.

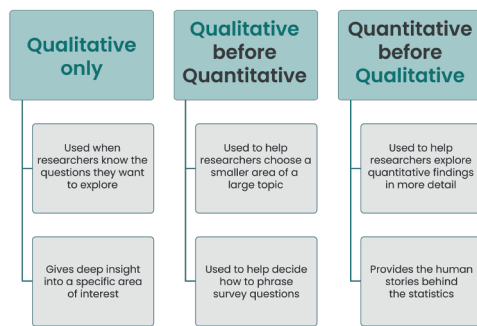


Figure 1 Different ways of using qualitative research

2 Preparing for a qualitative interview

The key to carrying out good qualitative interviews is good preparation. When you design a qualitative research project, you need to consider a wide range of ethical and practical issues. In this section we will cover:

- Ethical considerations
- Creating interview materials
- Setting up the interview
 - Equipment and practicalities
 - Pre-interview check

2.1 Ethical considerations

A key part of research is ensuring that participants have consented to be involved in your research. There are two fundamental reasons for obtaining written consent using a consent form. Firstly, the consent form provides a structure around which researchers can explain to participants the key aspects of the research that involves them. This helps to make sure that participants give 'informed consent', so they understand:

- key aspects of the research
- participation is voluntary
- the focus and purpose of the study
- what to expect from participating
- whether they will receive an incentive for taking part
- that they can pause the interview, stop the interview, or withdraw from the study
- how their data will be used, managed, and stored.

Secondly, the consent form acts as documentary evidence that participants have received information about, and have understood, these key aspects of the project. The form acts as a mutual agreement about the roles and responsibilities of interviewer and interviewee or researcher and participant, protecting the researcher as well as the participant.

The first stage in this process is ensuring that participants are clearly informed about the study they are signing up to. If they don't understand the research, they cannot consent to be involved in it. A typical way of doing this is to provide potential participants with what we collectively call 'participant materials'. These should be shared as part of the recruitment process, so potential participants can consider them before deciding to enrol in the research. Participant materials may include an information leaflet about the study and a copy of the consent form.

Once participants have read the materials you have provided, they need a way to indicate that they consent to be enrolled into the study. This can be done in several ways – through a physical document that participants sign, an electronic document which is emailed and which they sign electronically, or through an internet form, usually supplied as a link.

For the Reproductive Bodylore project, we created several participant documents. Participant Materials include a 'Friends & Family Information Sheet' and a 'Friends & Family Online Consent Form'. The information sheet was a word document, which was emailed to potential participants. The consent form was an online survey link which was emailed to potential participants.

It is good practice to use a two-stage consent process. This means that interviewees give some form of written consent (as outlined above) and that you also discuss consent at the beginning of the interview. Sometimes, this might be done by reading out each of the consent items to participants and obtaining their informed consent. In other cases it may simply be asking a question, or questions, checking they have given consent. Figure 2 shows the two-stage consent process, and some ways you might check consent at each stage.

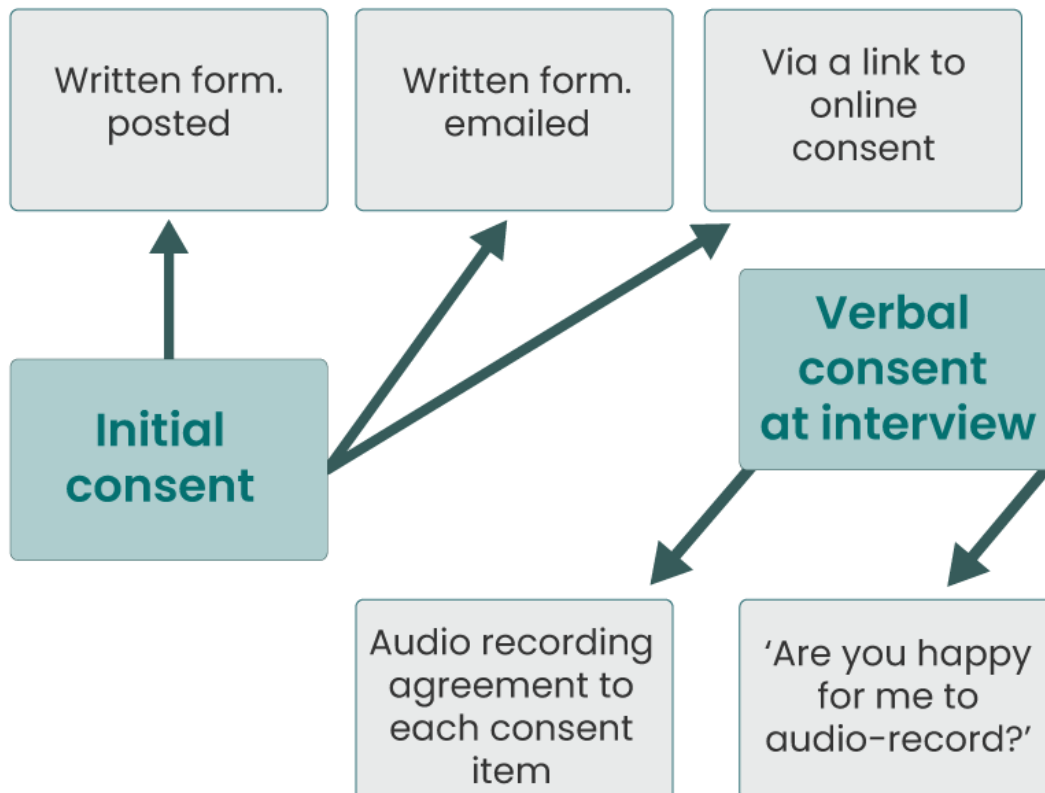


Figure 2 Two-stage consent process for qualitative interviews

Having signed a consent form and given verbal consent at the beginning of an interview does not mean participants cannot withdraw from the study. They should be free to leave the interview at any point, and to withdraw their data up until the point when analysis has begun.

2.2 Creating interview materials

Before you begin your interviews, you need to create the materials for them. These materials will depend on your research, but at a minimum should include a **topic guide**, a **distress protocol** and a **debrief sheet**.

Topic guide

Semi-structured qualitative interviews don't have a set list of questions that have to be worked through in order, but they do usually have a topic guide. This is a list of areas that you want to find out about that helps you structure the interview.

To begin creating a topic guide, make a list of the areas you'd like to cover. When your list is complete, think about what order would mimic a natural conversation and create the best flow. You may find it helpful to carry out a pilot interview to determine this. Interviews with different people will take different courses, so you may find you don't stick to the order in your topic guide, but if an interview does jump around, having the guide will help you make sure you haven't missed an important area.

Lastly, under each area, include two or three different questions that you might ask to find out about this area. Try to phrase these as open questions and avoid closed questions which can produce 'yes'/'no' responses:

- Open questions start with 'why'/'when'/'where'/'how'
- Closed questions start with 'do'/'did'/'don't'

You shouldn't expect to stick to these exact questions in the interview, but it can be helpful to have some ideas about what you could ask in case you get stuck during the interview. Please click [here](#) for an example topic guide from the Bodylore Project.

Distress protocol and debrief sheet

Sometimes interviewees become upset during an interview. We will discuss what to do if this happens in more detail in Section 3, but it is useful to think about this possibility and decide what you will do as you prepare for interviews. Creating a step-by-step process of what you would do is called a distress protocol.

If someone becomes very upset, or if their distress stays with them after the end of the interview, you might want to have a list of organisations who could listen to or help the interviewee. These organisations should be ones that interviewees can contact directly for free. A debrief sheet includes details and a bit of information about these organisations. Please click [here](#) for an example.

Reading through the materials just before the interview will provide a refresher and help you to feel more prepared. Reminding yourself of the interview questions will help you to guide the discussion in a more natural way and will help you to get the interview back on track if it strays a little too far off. Interviews can sometimes go off topic, so being able to bring it back to the main questions is an important part of a researcher's role.

2.3 Setting up the interview

There are several practical decisions to make when you set up an interview. These include:

- How long will the interview be?
- Will the interview be face to face, online, or over the telephone?
- Where will the interviewer and interviewee be located?

The length of the interview will depend on what topics the interviewer covers, the questions they ask, and what the interviewee says. This means that interviews with different people within the same research project may take different amounts of time. It is good practice to give interviewees an idea of how much time the interview might take, but for you to make sure you have a little time and flexibility after the interview, in case it runs over. Conducting a few test interviews to get an idea of the length is helpful.

Making decisions about whether interviews will be face-to-face or conducted remotely is often influenced by practical considerations regarding the location of the interviewer and interviewee. This decision can also be influenced by considerations about safety – for


example if you would need to go alone into someone's home to carry out an interview then you would need a Research Buddy System. This can include a pre-arranged check in with a colleague before and after the interview, where the colleague has a process to follow if you do not check in with them as planned. Remote interviews can offer more convenience, but they are reliant on the chosen technology (internet connection, phone signal, devices) working well for the duration of the interview.

Whether the interview is face-to-face or not, you need to establish an environment conducive for interview. Try to make sure you have a quiet space and are unlikely to be interrupted. You may want to ask participants to switch their phones to silent with you to prevent you both being disturbed, avoiding important stories being forgotten or interrupted.

Where interviews are conducted in person, ensure all persons involved are picked up on the audio-recording by arranging seating around the recording equipment. Ideally, place the recording equipment on a table, central to all persons. However, if someone has a particularly quiet speaking voice, you may want to consider placing the recording device slightly closer to them. For online interviews that are recorded (for example via Teams or Zoom) make sure all participants can be heard clearly.

You may also need to think about whether participants need to get themselves a drink or have a break. Check in with them mid-way through.

Activity 1

 5 minutes

Click [here](#) to review an interview room and identify any issues you would need to consider. Click items in the image to see our researchers' answers.

2.4 Equipment and practicalities

Qualitative interviews are usually transcribed for analysis, which means you need to audio record them and plan for transcription. You will need to plan for:

- how recordings will be stored until they are transcribed and anonymised
- who will have access to them
- when the recordings will be destroyed


You need to let potential participants know you will be recording the interview, get their consent, and tell them when the recordings will be destroyed. If you are interviewing face-to-face you might use a device such as a dictaphone; if you are interviewing online then many software packages have built-in recording options.

Transcription is a good way to become familiar with your data, but it is also very time consuming. Before beginning to recruit interviewees, you should plan who will transcribe the interviews. Some recording software have built-in transcription options, but you will need to make corrections and anonymise the transcript by replacing names, locations and other identifying features. Another option is to use a professional transcription company, but this can be quite expensive.

It is also important to set up a file system for your recordings and transcripts so that you can easily find them. Recordings and non-anonymised transcripts need to be stored securely and file names should not contain identifying details.

It's a good idea to spend some time before your first interview trialling the software or recording device and ensuring you know how it works. You may need to pause and restart during interviews, if you experience any interruptions.

Activity 2

 5 minutes

How many benefits can you think of for carrying out pilot interviews?
Click to reveal our list.

Answer

- Check how long interviews are likely to take
- Become familiar with the materials
- Check any equipment works
- Check for potentially distressing questions that you had not spotted
- Identifying problems with question wording
- Check the flow of the interview

2.5 Pre-interview check

Once you have established the ethical basis for your interviews, the topics you will cover, who you are interviewing, how and where, you are ready to begin your interviews. Just before each interview you will need to complete several checks on your equipment and materials. It can help to create a checklist for yourself.

Activity 3

 15 minutes

Make a list of the things you might do in preparation for an interview.

- How might you prepare?
- What things or equipment might you need?

Once you have done this click 'reveal' to see our suggestions.

Provide your answer...

Answer

- Read through the topic guide and any other interview materials.

- Have your topic guide to hand.
- Check you will not be interrupted by people/electronic devices.
- Have a glass of water to hand.
- Check just before the interview that your dictaphone or Zoom is working and has full batteries/is plugged in.
- Once the interview begins, check that you are recording.
- Check the interviewee still consents to the interview, and that they are aware you are recording.
- Ask if the interviewee has any questions.
- Once these are answered, tell the interviewee you will begin with the interview questions.
- Work your way through the topic guide, but remember it is just a guide, interviews don't have to follow the topic guide's order. Allow exploration of some areas in more detail if it is helpful.
- End the interview by thanking the participant and asking if they have any questions. Signpost the interviewee to additional resources if necessary.

3 Conducting interviews

During interviews, your role as a researcher is to draw on the topic guide to develop an understanding about interviewee's views or experiences. Interviews are a collaborative process between you and the interviewee. You are guiding the interview, ensuring that the interviewee is happy to share their story, that no important areas have been missed out, and keeping the interview to time.

In this section we will cover:


- Asking questions
- Ongoing consent
- Dealing with distress
- Ending the interview

3.1 Asking questions

There are three broad kinds of questions in qualitative interviews – closed, open-ended and probing. Closed questions can be answered from a pre-determined list. They can often be answered with a single word –yes/no is a common example, but any question that gives the interviewee a set of pre-determined answers is a closed question, such as asking someone's age.

Open-ended questions don't provide the interviewee with a set of answer choices, instead encouraging them to provide responses in their own words. Probing questions are follow-up questions for when you don't fully understand a response. Answers may have been vague or ambiguous, or you might want more specific, in-depth information.

Activity 4

 5 minutes

Are these questions open or closed?

Interactive content is not available in this format.



Answer

1. Can you tell me a bit about yourself? **Open**

This question is open. It invites the interviewee to speak about themselves.

2. How old are you? **Closed**
3. What is your ethnicity? **Closed**
4. What is your gender? **Closed**

These are closed questions. Answers could be selected from a list. They add demographic detail about the interviewee. Some interviewees may speak in more

detail for example about their ethnicity or gender identity, but the question is likely to invite a short response from most interviewees.

5. Where do you get your information about contraception? **Open**

This question is open. It invites the interviewee to speak about their approach to seeking information.

6. Do you talk to your family about contraception? **Closed**

This is a closed question. It could be answered with a simple 'yes' or 'no'.

7. What are your personal experiences with contraception? **Open**

This is an open question. It invites interviewees to speak about their experiences.

8. What sort of things do you consider when choosing a contraceptive method?
Open

This is an open question. It invites interviewees to speak about what is important to them when making a decision about contraception.

9. Have you ever tried the contraceptive implant? **Closed**

This is a closed question that could be answered with a simple 'yes' or 'no'.

10. What were your experiences with the contraceptive implant? **Open**

This is an open question. It invites the interviewee to reflect on and speak about their experiences with the contraceptive implant.

In qualitative interviews you will sometimes find closed questions useful, such as when checking you have an interviewee's consent to the interview. However, the richest data comes from asking open-ended questions about areas covered in the topic guide in the main body of the interview, supplemented by probing questions where appropriate. Probing questions can be open-ended or closed.

It is quite common that some questions can start a long response from interviewees. Try not to feel pressured to stick rigidly to the questions in your topic guide, what is most important is the richness of the data. If there are any unclear or vague stories, try to draw more information out of interviewees, be inquisitive, seek clarification, and ask additional relevant questions. Asking for clarification, even for things that might appear obvious, is often a very good way of generating more detailed and richer data in qualitative interviews.

Sometimes the artificiality of an interview context can induce anxiety which can mean participants give one-word/short responses to questions. Occasionally, this can create a dynamic where the researcher falls to closed questioning leaving little space for the participant to give lengthy and detailed answers. If this happens, ask open-ended questions and avoid closed questions which produce 'yes'/'no' answers. Remember, open questions start with 'why', 'when', 'where', 'how' and closed questions start with 'do', 'did', and 'don't'.

Lastly, think of the interview as a conversation between you and the interviewee. Convey this to them so that it feels more like you're having a discussion or chat together, and less like you're putting them in the hot seat.

3.2 Ongoing consent

In Section 2 we said it was good practice to use a two-stage consent process. This means that as well as interviewees having signed a consent form, the interviewer should check at the beginning of the interview that the interviewee is still happy to go ahead with the interview. It is good practice to do this after the recording has begun, so there is a record.

Signing a consent form and giving verbal consent at the beginning of an interview does not mean that participants cannot withdraw from the study. They should be free to leave the interview at any point. Interviewees should also be able to withdraw their consent for a limited period of time after the interview has finished. If an interviewee does withdraw their consent after the interview, you will stop analysing their data and destroy any recordings or transcripts. It is usual to say that interviewees can only withdraw their data up until the point when analysis has begun, as after it may be impossible to remove their individual responses from the anonymised pool of data.

3.3 Dealing with distress

Any research interview can prompt thoughts, feelings or reflections which may be distressing. Sometimes you may be aware of likely distress because you are interviewing people about something that is upsetting, but on other occasions you may not anticipate that a topic is upsetting. As researchers we should always be prepared for the *potential* that our questions, or the telling of stories, can induce distress in our participants.

Activity 5

 15 minutes

Read the example below and make notes about how you might respond if you were the interviewer.

You are interviewing Sophia about her experiences with contraception. Sophia tells you that she started taking the pill when she was about 16 years old to help manage her periods. She then swapped to the contraceptive implant. She has recently had her implant removed. You ask Sophia why she had her implant removed and she gets upset and starts to cry. She tells you that her long-term partner left her and that she feels very sad and down about it. Sophia is visibly crying.

How might you respond? Write a few thoughts down and then reveal our suggestions.

Provide your answer...

Answer

Ask if Sophia would like to take a break from the interview, reassure her that she can stop the interview at any time without giving a reason, ask Sophia if she needs anything like a drink or a tissue. After the conclusion of the interview, offer Sophia a debrief sheet with links to additional resources that she can access if she still feels very upset.

There are ways we can minimise the chances of distress. It is good practice to design the topic guide carefully, to minimise the potential for distress if we can. Giving participants information leaflets, consent forms, and the topic guide before the interview ensures they know what to expect and consent to it. It also prepares participants for the kinds of questions they'll be asked and provides the opportunity to consider their responses. As such, having these materials before the interview reduces the risk of distress. It is also a good idea to consider how you would respond to a distressed interviewee before beginning your interviews and record this in a distress protocol.

If, despite your preparations, an interviewee does become upset, you need to know how to respond to them.

1. If you observe any signs of upset in your participants, the first step is to acknowledge this. You can do so by saying things like 'I can see that question upset you' or 'Is thinking about that difficult?'.
2. Give them the option to take a break from the interview, or to stop altogether.
3. If they would like to proceed, be led by them and give them time. Remind them that they are under no obligation to answer particular questions if they do not wish to do so (as per the consent form).
4. If appropriate, you may wish to direct participants to the debrief sheet after the interview or email it to them again.

Some interviewees belong to groups that are deemed more vulnerable than others. For example, there may be safeguarding issues to consider when interviewing young people, especially those under 18 years old, or vulnerable people. You may need to seek further guidance from the safeguarding lead at your institution or place of work. For a more advanced understanding of ethics in research, including safeguarding, please see the OpenLearn course [Becoming an ethical researcher: Session 3: 3.2](#).

It is also important to remember that you, as a researcher, are consenting to the interview. If you feel uncomfortable or distressed during an interview you can draw the interview to a close.

3.4 Ending the interview

Interviews often draw to a close naturally, this happens because all of the questions have been asked, or all of the relevant stories have been told. On other occasions though, interviewees may have a lot they want to say, or the researcher has more questions they want to ask. An aspect of your role as an ethical researcher is to ensure the interview process isn't over taxing to you or your interviewee. This is part of taking care of your interviewee and managing your own self-care. To do this, it is important to keep track of time, to intermittently assess the progress of the interview, and to keep it moving along steadily.

If you get near to the end of the time you had said the interview would last and you anticipate going over, you can consider either extending the interview or wrapping it up with a few final questions. This decision will be based on your assessment of how you and your interviewee are doing. It can help to ask yourself:

- Are we both/all still actively engaged?
- Do I or my interviewee appear to be tiring?
- Does the interviewee seem to be running out of steam – e.g. is the same material being repeated?

- Is the focus of interview still on track or are other, less relevant subjects being talked about?
- Is extending the interview likely to add new material not already discussed?

Mull these questions over and whether you decide to extend or draw to a close, consult with your interviewee first.

Once you have indicated that you are ending the interview, but before you stop recording, check if interviewees have anything else they want to add that they have not already spoken about. Once, they've finished, inform them you're going to stop recording. Once off, reiterate to them that they are no longer being recorded. Thank the interviewee for their time and reassure them that their contribution is helpful to your study. Reiterate the ways in which their interview will be used.

Post interview debrief

1. Thank them: 'Thank you for your time and contribution to the study.'
2. Confirm how their interview data will be used: 'Some of your interview data will be used in academic papers, to inform policy and practice, and in a public engagement exhibition (your name, location, or other identifying information will not be included).'
3. Provide participants with a 'Debrief Sheet' of support services.
4. Remind participants of their option to withdraw (e.g. up to 6 weeks from interview date).
5. Ask a question or two about what they have planned for the rest of the day.

It can be helpful to provide all interviewees with a debrief sheet and verbally make participants aware of the relevant organisations listed at this point. It is essential you do this if an interviewee became distressed at any point during the interview. It is also good practice to remind them that they have the option to withdraw from the study if they wish, how long they are able to do this for, and how to do this. Finally, to transition out of the interview relationship, ask them a question or two about their day, what they have planned, etc.

4 After the interview

After the interview has been carried out, the researcher's job is not finished. You will need to process the data so it can be analysed, stored securely, and you may need to give feedback to the people you interviewed. In this section we will cover:

- Making reflective fieldnotes
- Uploading/sending files
- Storing data
- Anonymisation options
- Feeding back to interviewees

4.1 Making reflective fieldnotes

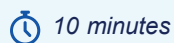
Writing up reflections is an important part of any researcher's job. Fieldnotes serve three main functions. Firstly, they give anyone looking at the interview transcript an understanding of the context of the interview. Secondly, they help the researcher to remember the details of their interview and interviewee. Thirdly, once all interviews have been completed, it enables information about all interviews to be collated.

The kind of information that you might want to capture could include:

- your thoughts and reflections from the interview, things you think went well, and those that didn't go so well
- details about the interview itself such as whether the interview was conducted via zoom, telephone, or face-to-face, and how long it lasted
- demographic details about your interviewee (providing they are willing to give this information) such as, gender, age, and ethnicity

It can be helpful to create a fieldnote proforma to complete after your interviews. Once you have completed each interview, you should record your reflective fieldnotes on the proforma document and store it securely. Treat this data in the same way you treat interview data.

Activity 6



10 minutes

Take a look at the Reflective Fieldnotes Proforma below. Come up with your own proforma for your research project.

Table 1: Reflective Fieldnotes Proforma

Interviewer	Date & time	Length of interview
How was information and consent carried out? (e.g. Zoom/face-to-face/telephone)		How was the interview conducted? (e.g. Zoom/face-to-face/telephone)
Gender of interviewee:	Ethnicity of interviewee:	Age of interviewee:
What are your reflections on the interview? (e.g. what were the main points discussed? Was there anything particularly memorable or interesting?)		

What worked well?
What didn't work so well?
Are there any safeguarding issues or ethical concerns?

4.2 Uploading and sending files

One important responsibility of the researcher is to manage data. This involves appropriately storing, destroying, and protecting interviewees' data. Data needs to be stored securely and encrypted and/or password protected. You may have drawn up a data management plan as part of your research ethics application, if so, you need to ensure that the way you store the data is compliant with this. More advice from The Open University about writing a data management plan can be found [here](#).

If you are sending your recordings for transcription by someone else, you need to ensure the way you send this is secure and compliant with both your ethical approval and any requirements from the funder. This commonly means that you need to transfer files via a secure website rather than sending them by email.

Remember that even if you are using a professional transcription service, you will need to allow time to go through the transcript and check the accuracy, especially if your interview uses specialised or technical language. You will also need to anonymise the transcripts.

4.3 Storing data

Interviewees contact details, recordings of interviews, transcripts and fieldnotes are all data. Researchers must store data in ways which protect the interviewee and are compliant with General Data Protection Regulations (GDPR). If your research is funded by an external organisation, they may have conditions about how data is stored which form part of their contract with you. Most of the conditions require you to store data in a way which is secure and ensures no-one else can access the data. These requirements apply to electronic data and to printed or hand-written data, such as notebooks. Usually, you will need to specify how you will store data as part of the ethical review of your project before you start. It can be a good idea to re-familiarise yourself with any such documentation before storing your data.

More information about GDPR can be found [here](#).

Once data - such as interview transcripts - are anonymised they can be shared in the form of a report, or via a data repository. Sharing data via a data repository allows other researchers to carry out further analyses of the data and is good practice.

4.4 Anonymisation options

You will need to anonymise both transcripts and fieldnotes by removing any names, locations, or any other identifying information. When removing these details you should make it clear that anonymisation has happened and specify what has been removed. There are several ways to do this; using pseudonyms, omitting information and replacing it with a description, or using codes. Each has advantages and disadvantages and many researchers will use a combination of methods.

Pseudonyms

You can replace people's names and locations with names and locations you have made up. For example, if you have an interviewee whose name is Jane who lives in York, you could replace her name with Anne, and York with Cityville. If you choose this, you should make it clear in any reports that you have used pseudonyms.

Advantages	Disadvantages
Improves readability Allows you to indicate gender and sometimes ethnicity through name choice You can allow interviewees to choose their own names	Potential to choose an inappropriate pseudonym (culturally, or because interviewee dislikes it) It can be time consuming to choose appropriate names or to rename locations

Omitting information

You might omit any identifying data and replace it with a description of the information you have replaced, for example replacing someone's name with '[name]' and someone's email address with '[email]'.


Advantages	Disadvantages
Simple Easy to be consistent No potential for inappropriate choices	Can interrupt the reading experience Can feel less personal May lose details about who interviewees are

Codes

You can give each interviewee a numerical code, and then provide demographic information in a table within any report. If you are using a code system, you may need to use another method to anonymise other details, such as locations.

Advantages	Disadvantages
Allows you to give information about interviewees without the potential to choose inappropriate names Easy to be consistent	Can interrupt the reading experience Can feel less personal Depending on the demographic details given, care may need to be taken that interviewees are not recognisable

Activity 7

 10 minutes

Read the transcript excerpts provided and decide in each case whether the anonymisation is a good or bad example.

Start with a yes/no answer then think about why you have come to this conclusion. For example, it's too revealing, the choice makes everyone male/white/etc., it's too close to their actual name.

Example one - original transcript

So, the first part then, could you tell me a bit about yourself, so your background, a bit about what you do at the moment?

Yes, so my name's Rachel Smith, I live in Preston and I'm 45 years old. I work part-time as a veterinary nurse. I have two children: one age 12 and one aged nine. I have a partner and we've been together about 17 years.

Anonymised transcript

So, the first part then, could you tell me a bit about yourself, so your background, a bit about what you do at the moment?

Yes, so my name's XXX, XXX XXX and I'm 45 years old. I work part-time as a veterinary nurse. I have two children: one age 12 and one aged nine. I have a partner and we've been together about 17 years.

Answer

This anonymisation works, but we lose some of the context about the information that has been given.

Example two - original transcript

Tell me a little bit about yourself.

So I'm 47 years old. I live in Wrexham in Wales. I grew up in a little town called Brighouse near Huddersfield. I've got a boy, my son who's 14 and a daughter who is 11. I'm married to my husband Gwain and we've been married for 18 years. And I studied here in Wales and I went to nursing college here in Wrexham and I work now as a practice nurse.

Anonymised transcript

Tell me a little bit about yourself.

So I'm 47 years old. I live in [city] in [country]. I grew up in a little town called [town] near [another city]. I've got a boy, my son who's 14 and a daughter who is 11. I'm married to my husband [name] and we've been married for 18 years.

And I studied here in [country] and I went to nursing college here in [city] and I work now as a practice nurse.

Answer

This anonymisation has worked well. We can understand the context of information that has been given, but anonymity is preserved.

Example three - original transcript

Did you talk about your experiences with the pill with your sister?

All I remember as growing up that I think she started taking the pill, but she had a lot of problems, she always had just either heavy periods or really bad stomach pains. Where I was OK, I didn't seem to have any problems, I seemed to be OK, I was on the combination pill where you get a seven day break and I had no problems at all. But I always remember Marie always had, what you'd call like her periods were never right, so yeah. But no I don't think we've ever spoke about it to be honest. Well not at that age, not when we were young I don't think.

Anonymised transcript

Did you talk about your experiences with the pill with your sister?

All I remember as growing up that I think she started taking the pill, but she had a lot of problems, she always had just either heavy periods or really bad stomach pains. Where I was OK, I didn't seem to have any problems, I seemed to be OK, I was on the combination pill where you get a seven day break and I had no problems at all. But I always remember Mary always had, what you'd call like her periods were never right, so yeah. But no I don't think we've ever spoke about it to be honest. Well not at that age, not when we were young I don't think.

Answer

This anonymisation has not worked well, as it has made the pseudonym too similar to the original name.

Example four - original transcript

So the first part we're going to talk about is the beginning parts of contraception, so for you if you can tell me Aaliyah, when you were first introduced to contraception and how that came about for you?

I suppose contraception, talked about it with my mum.

Anonymised transcript

So the first part we're going to talk about is the beginning parts of contraception, so for you if you can tell me Anne, when you were first introduced to contraception and how that came about for you?

I suppose contraception, talked about it with my mum.

Answer

This anonymisation has not worked well, as it has made the pseudonym of the interviewee too different by choosing a name that implies a different cultural background.

Example five - original transcript

Can you tell me a bit about yourself?

I'm 23, and I live in Brighton, with my partner Jordan. We don't have kids, but we do have two cats.

Anonymised transcript

Can you tell me a bit about yourself?

I'm 23, and I live in Townville, with my partner Richard. We don't have kids, but we do have two cats.

Answer

This anonymisation has not worked well, as the gender of the partner has been assumed when they have a unisex name.

Example six - original transcript

So at the points when you've had the children and in between have you returned to the same forms of contraception or have you had different?

I think I went back on the pill; and then the last one, for Rowan when I said that I wasn't going to have any more children then I ended up with a [coil](#).

OK. So do you still have the coil now?

No.

And is there a reason why you don't have it now?

Well because Phil had a [vasectomy](#).

Anonymised transcript

So at the points when you've had the children and in between have you returned to the same forms of contraception or have you had different?

I think I went back on the pill; and then the last one, for Ash when I said that I wasn't going to have any more children then I ended up with a coil.

OK. So do you still have the coil now?

No.

And is there a reason why you don't have it now?

Well because Phil had a vasectomy.

Answer

This anonymisation hasn't worked well. Although the child has been given a suitable pseudonym, the partner's name has been left in.

4.5 Feeding back to interviewees

Interviewees are often interested in what happens to the information they gave you and how you have used it. If you are using the information to create a report, you might want to offer interviewees a copy when you have completed it. As part of your consent form, you might ask interviewees if they would like to receive a copy and get their consent to keep their details for a limited time to allow you to send them your final research.

Conclusion

You have covered a lot of ground in this course! The topics covered have explored why you might use qualitative interviews, how to prepare for them, carry them out, and what to do after the interview is finished. You have had the chance to look at strategies and tools other researchers use and consider your own practice as a researcher. We hope you now feel better equipped in terms of understanding the process of designing and carrying out qualitative interviews.

We wish you every success.

Further sources of information

Interested in taking your learning further? You might find it helpful to explore the Open University's [Health and Social Care courses and qualifications](#).

Or for more information about research, you might be interested in [Understanding different research perspectives: 6 Research strategy - OpenLearn - Open University](#).

Acknowledgements

This free course was written by Victoria Newton and Mari Greenfield.

The course has been developed from the findings of Reproductive Bodylore: The Role of Vernacular Knowledge in Women's Contraceptive Decision-Making, funded by an Arts and Humanities Research Council (AHRC) Grant (AH/S011587/1) and led by a research team from The Open University (OU) and undertaken in partnership with Public Health England and The Folklore Society. Our thanks to all the volunteer researchers and participants in the Reproductive Bodylore project. Thanks also to the project advisory group.

Except for third party materials and otherwise stated (see [terms and conditions](#)), this content is made available under a

[Creative Commons Attribution-NonCommercial-ShareAlike 4.0 Licence](#).

The material acknowledged below is Proprietary and used under licence (not subject to Creative Commons Licence). Grateful acknowledgement is made to the following sources for permission to reproduce material in this free course:

Every effort has been made to contact copyright owners. If any have been inadvertently overlooked, the publishers will be pleased to make the necessary arrangements at the first opportunity.

Don't miss out

If reading this text has inspired you to learn more, you may be interested in joining the millions of people who discover our free learning resources and qualifications by visiting The Open University – www.open.edu/openlearn/free-courses.