McMaster University | Family Medicine
David Braley Primary Care Research Collaborative

Qualitative Interviews and Focus Groups: Developing, Piloting, and Conducting Your Study

High-quality qualitative data collection requires thoughtful preparation before the interview or focus group, careful development of a question guide, piloting of the guide, and attention to ethical and practical considerations during data collection. This resource provides an overview of these key steps.

1. Developing an Interview or Focus Group Guide

Qualitative researchers commonly use structured, semi-structured, or unstructured interviews. Semi-structured interviews are frequently used because they balance consistency across participants with flexibility to explore emerging ideas.

An interview guide should:

- Be flexible and conversational.
- Allow movement between questions and topics.
- Use participant-centered, non-leading language.
- Include clear, single-focused, open-ended questions.
- Encourage spontaneous, detailed, and personal responses.
- Generate rich data that may reveal new concepts and perspectives.

Writing Effective Questions

Questions should generally begin with: what, how, who, where, when. In some cases, "Why" may also be appropriate. Avoid questions that can be answered simply with "yes" or "no."

Structure of a Semi-Structured Guide

A semi-structured guide typically contains three levels of questions:

1. Opening or introductory questions
2. Main themes (key questions)
3. Follow-up questions and probes

Opening Questions help:

- Establish rapport.
- Break the ice.
- Create a comfortable environment.
- Introduce participants to the topic through familiar experiences.

Main themes focus on the core research topic. Questions should:

- Encourage participants to speak freely about experiences and perceptions.
- Be asked consistently across participants.
- Progress in a logical order.
- Move from general to specific topics.

- Begin with less sensitive topics and gradually move to more personal or emotional discussions before ending on lighter topics.

Follow-up questions help:

- Clarify participant responses.
- Direct discussion toward study objectives.
- Enhance depth and detail.
- Maintain conversational flow.

Follow-up questions may be pre-planned, spontaneous based directly on participant responses.

Probing Techniques

Probes encourage participants to expand upon their responses.

Verbal probes:

- Asking for examples
- Restating participant comments
- Expressing interest
- Encouraging elaboration

Non-verbal probes:

- Strategic silence
- Allowing participants time to think aloud before responding

Ending Questions

Conclude with a broad reflective question such as: "Considering everything we've discussed today, what do you think is most important?"

Researchers may also:

- Summarize the discussion.
- Revisit the study purpose.
- Ask whether participants would like to add anything else.

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2. Piloting the Question Guide

Piloting is an essential step in qualitative research. A pilot helps determine whether participants understand the questions and whether the guide produces sufficient depth and richness to answer the research questions.

Preparing for Data Collection

Create a checklist to ensure all necessary materials and logistics are in place. Consider:

- Confirming date, time, and location.
- Bringing consent forms.
- Having pens or pencils available.

- Preparing recording equipment.
- Bringing spare batteries if needed.
- Printing or accessing the interview/focus group guide.
- Preparing paperwork to process participant compensation.

Practice Interviews or Focus Groups

Conduct several practice sessions before collecting actual data. Benefits include:

- Becoming familiar with the guide.
- Improving probing skills.
- Becoming comfortable with silence.
- Learning how to manage unexpected responses.
- Identifying unclear or problematic questions.

Practice participants may include: team members, community members, individuals similar to the target sample.

Conducting the First Real Interview

The first actual interview or focus group often serves as the pilot and may be included in the final dataset if the data quality is adequate. Consider:

- Does the information address the research questions?
- Are participants answering the questions you intended to ask?
- Are questions generating sufficient detail and depth?
- Are probes helping to produce richer responses?
- Are you allowing enough silence for reflection?
- If conducting a focus group, are participants receiving equal opportunities to speak?

Revising the Guide

Piloting often reveals opportunities for improvement, including:

- Rewording questions.
- Adding new questions.
- Reordering sections.
- Providing additional context or instructions before certain questions.

Researchers should document these changes transparently when reporting study methods. Ongoing reflection and refinement throughout data collection are considered good qualitative practice.

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3. Conducting Virtual Interviews and Focus Groups

Virtual data collection requires additional planning around consent, privacy, security, and recording procedures.

Informed Consent

Participants should receive information about:

- The virtual platform being used.

- Privacy and confidentiality risks.
- Recording procedures.
- Data storage and security measures.
- Where appropriate, participants may provide verbal consent after reviewing a Letter of Information. Consent procedures should include explicit statements regarding audio and/or video recording.

Selecting a Virtual Platform

Researchers should use institutionally approved platforms whenever possible and follow platform-specific guidance for secure meeting setup. Zoom and Microsoft Teams are available through McMaster.

Recording Interviews and Focus Groups

Audio Recording

- Recording directly to a secure storage location whenever possible.
- Avoiding storage on external servers when alternatives exist.
- Downloading cloud recordings immediately when cloud storage cannot be avoided.
- Storing recordings on password-protected and encrypted devices.
- Explaining recording and security procedures in participant information materials.

Video recording should only be used when required by the methodology and clearly justified. Participants should be informed:

- If video recording will occur.
- Why it is necessary.
- How recordings will be stored and protected.

For many qualitative studies, audio recording alone is sufficient.

Accessibility and Participation

Researchers should consider whether participants can:

- Join using audio only.
- Participate without a camera.
- Access alternative methods of participation when needed like by phone or in-person.

Audio-only participation may improve accessibility and confidentiality, especially for sensitive topics.

Confidentiality in Virtual Focus Groups

Participants should be reminded:

- Not to record the session.
- That confidentiality depends partly on participant behaviour.
- That researchers cannot fully prevent unauthorized recording by participants.

For highly sensitive topics, individual interviews may be preferable to focus groups.

Privacy Risks

No online platform can guarantee complete privacy. Participant information materials should:

- Identify the platform being used.
- Describe any privacy risks.

- Explain how data will be stored.

Offer alternative participation methods where feasible.

Protecting Virtual Sessions

Researchers should take steps to prevent unauthorized access by:

- Keeping meeting links private.
- Using passwords or authentication features.
- Disabling unnecessary permissions (e.g., screen sharing).
- Knowing how to remove uninvited attendees.
- Becoming familiar with platform security settings before data collection.

Key Takeaways

Successful qualitative data collection involves:

1. Developing a flexible, open-ended interview or focus group guide.
2. Piloting the guide to assess clarity, flow, and data quality.
3. Refining questions based on pilot findings.
4. Using effective probing and active listening techniques.
5. Ensuring appropriate ethical, privacy, and security procedures, particularly when collecting data virtually.