



# Tips for collecting primary data in a Covid-19 era

Fiona Samuels

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## About this article

In this 'How To' document, we provide some suggestions and tips for collecting remote primary data. This document is focused on qualitative primary data collection over the phone. However, some of the tips are also valid for quantitative surveys or questionnaires, and some of the suggestions may be modified for use in more structured surveys. The note starts with ideas about re-thinking an approach. It then moves on to consider what to think about or prepare before a phone interview, followed by how to run the interview. After providing some suggestions on other possible methods, the note concludes with some ethical challenges and proposed solutions. The note is not comprehensive or exhaustive, it is merely a set of hints and suggestions. It will likely be updated as experiences accumulate of doing remote fieldwork alongside challenges and learning in a Covid-19 era.

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## Re-thinking study design (and focus)

- The methodology/study designs may have to guide the focus and objectives of the study rather than vice versa; but given that Covid-19 is affecting all domains of life, it will probably need to be included in the objectives/questions anyway.
- It is probably easier to do remote primary data collection with respondents with whom you already have a rapport and/or you have interviewed before, so consider re-interviewing the same people again, doing cohort studies, etc.
- Doing remote qualitative primary data collection most likely is easier than doing remote quantitative data collection, so consider if and how you can adapt your approach accordingly
- Researchers should consider using fewer respondents, but going into more depth (see below).
- Researchers need to think about drawing on/interviewing the people that your (initial) respondents live with, i.e. focus your questions on household units (whatever they may consist of; see below).
- Linked to the above, if your study did not previously have questions about intra-household dynamics, this would be an opportunity to add them.
- Researchers can still consider using participatory/human-centered design approaches, e.g. during first contacts, discuss with respondents the challenges of doing remote interviews, ask their opinions on how they might do this study (methodologically), and what areas they would like to focus on and why (demand generation).
- More time will be needed to conduct primary data collection, so this must be built into timelines.
- More time will be required for setting up/preparing the field so this also needs to be built into timelines.
- Researchers should work much more through local/in-country partners, and these partners in turn through their local networks, government and non-governmental organisation (NGO) staff at the community level (social mobilisers, community health workers, etc.).
- At the end of each day, data collection teams often carry out short debriefing sessions discussing emerging findings, challenges, themes to follow-up, etc. – these should continue by phone. Such sessions will be even more important than before to share experiences, build team rapport, etc. More time than usual may be needed.

## Preparing the phone/video calls for data collection

- One-to-one interviews are easiest.
- Group calls/videos may be possible if there is access to the internet through, for example, WhatsApp. Given the situation, these may need to be household groups – such as family case studies or intergenerational discussions (see existing guidance, Samuels et al., 2015).
- Pilot or role play group calls beforehand – more preparation will probably need to be done than previously.
- Develop interview guides to ensure that questions are clear and not long winded – they need to be shorter and clearer than when interviewing face to face; although they may not be closed/survey-type questions, it could be worth moving in that direction.
- More time may be needed for training junior researchers; if possible, work with researchers who have experience of carrying out qualitative research, at least initially, so that they can help to develop and fine-tune the approach.

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- Pilot or role play interview guides on the phone beforehand.
  - Work closely with organisations in the fieldwork sites – such as NGOs, local government staff, social mobilisers – who have existing contacts with potential study respondents:
    - Organise phone calls with them beforehand to clarify aims, scope, their role, ethical issues, etc.
    - Provide appropriate incentives for them (e.g. airtime, transport money).
    - They will need to pre-identify respondents with (access to) phones.
    - These contacts may visit, keeping a distance, or phone potential study respondents seeking a first level of consent, either directly from them or from their guardians (if underage).
  - Brief/learn from the social mobiliser cadre on any government regulations/restrictions that can affect the process (e.g. movements, meeting people, hygiene) and adjust the approach accordingly – discuss any related messages that would need to go out to study participants, e.g. cleaning of mobile phones if shared.
  - In some cases, if social mobilisers are known and have already had experience of doing interviews, the social mobilisers themselves could do the interviews directly after some remote coaching by the in-country partner and if the tool is relatively straightforward to use; where there is access to computers, you could also send the interview guides electronically (or by post).
  - Given that you may lose respondents due to poor phone reception and/or interviewees may not pick up then phone after the first call, you should oversample and obtain contacts for more respondents than needed.
  - If respondents have access to smart phones, provide/pay upfront for data bundles in order to do video calls.
  - In order to access respondents who do not have phones, snowball from respondents who do, asking them for their help to identify and contact possible participants, while at the same time keeping physical distances.
  - Ideally, you want to record phone interviews, with appropriate consent, so the interviewers phones need to have speaker functions and have voice recorders to hand.

## Tips and steps for doing phone interviews

- Keep phone calls short, a maximum of 20–30 minutes.
  - Arrange for multiple calls to cover different areas and take breaks at the most appropriate times.
  - Find a time that is convenient for the respondent; this may be early in the morning or late at night, so you need to be flexible.
1. The first call should ...
    - a. focus on rapport building, and seeking permission and verbal consent for the study including whether it will be recorded; if the respondent is underage, this will entail asking guardians for their permission (although preliminary permissions will have been obtained already, see above);
    - b. introduce the study; if returning to respondents from a previous study with them, remind them what was done before and ask whether they have any questions;
    - c. ask whether respondents have any suggestions on how to run the interview/phone call and what area they would like to focus on (demand generation/human-centered approaches);

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- d. establish early on the date and time for a second call, in case the interview may have to end abruptly (e.g. because someone else may overhear; see below); ideally, the next scheduled call should be for the next day or the day after, otherwise you may lose momentum, but you need to be aware the respondent's other commitments;
      - e. if you have time and once consent is obtained, start with a few general questions, if not too sensitive (e.g. questions about socio-demographics, who the respondent lives with); then you can start to ask a few questions related to the main focus of the study;
      - f. end by thanking the respondent and restating the day and time of the next scheduled call.
    2. As soon as possible after the call, listen to the audio (if recorded), translate/transcribe if you have the resources, and/or review notes and plan questions to ask in the second call; questions may probe further/triangulate, or may be additional and complementary.
    3. The second call should ...
      - a. warm up, continue with rapport building and ask some introductory questions (how they are, how their family is, if they can speak now, if their mobile battery is charged, etc.);
      - b. remind the respondent briefly what was discussed in the previous call and continue with next set of questions;
      - c. (as in the first call) establish early on the date and time of the next interview;
      - d. end by thanking and restating the day and time of the next scheduled call.
  - I suggest a maximum of three calls; beyond that, you may reach saturation point and/or suffer respondent fatigue.
  - You may want to focus on different sets of questions with different respondents to ensure you have covered all areas.
  - Be prepared to call multiple times, be flexible on timing, etc.; if there is no response or you cannot organise an interview time/date after e.g. 4 calls, move on to the next possible interviewee in your list
  - Given that there may be a loss of respondents in the follow-up (see above), ensure that a few areas have been covered in depth each time, so the data is useable.

## Other approaches to obtaining data

- Beyond doing remote interviews and/or group discussions, you need to be creative and innovative in other ways to collect data, while ensuring adherence to guidance on restricted movement. The below can be adapted to low- and middle-income country contexts:
  - Sampling naturalistic data from traditional media (e.g. magazines, books, newspapers, podcasts and television) or publicly accessible social media (e.g. Facebook, Twitter, open forums, YouTube).
  - Sampling naturalistic data from closed/protected social media or online communities with explicit permission from administrators.
  - Photovoice or photo elicitation using previously generated images or newly generated images where there is no copyright or the participant owns the copyright.
  - Autoethnographic data collection/keeping diaries.
  - Observational studies.

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## Ethical considerations and other challenges

- You need to take informed verbal consent (as can be done / is a recognised way of obtaining informed consent). There will be two levels, first with the mobiliser and then:
  - if the respondent is under the age of full legal responsibility, you need to obtain the consent of the guardian (see above);
  - if using someone else's phone, you also need consent from that person.
- Researchers must be clear and succinct when reading out consent information to the study respondent, providing contact details of the lead researcher/principal investigator, letting them know how data will be stored and used, that all information will be anonymised, etc. – what is usually expected in an informed consent process.
- Train the mobiliser on ethical issues and how to take informed consent.
- If there is evidence that the interviewee feels uncomfortable (e.g. when dealing with sensitive topics) and/or someone may be listening, and that this may be affecting how the respondent answers, then the interview should be ended.
  - Evidence of the interviewee facing unease may take the form of the voice changing pitch/timbre.
  - Agree on a word beforehand that the interviewee says to indicate that the interview needs to stop.
  - The social mobiliser could be present, but sitting at a distance so they cannot hear the conversation and also taking distancing regulations into account; this may make it easier for the respondent to speak.
- To confirm the identity of the caller and ensure that the researcher is speaking to the person they want to speak to (especially if there is no video), the social mobiliser can facilitate introductions, provide an informed consent process and even be there, at a distance, if appropriate (see above).
- Develop a safeguarding protection strategy, with a focal person in the research team assigned to take forward any instances in which protection issues may be violated. Such a strategy can draw on existing safeguarding strategies, adapting process so that mobile phones especially can be used – such processes may become even more critical as evidence emerges of e.g. increases in violence as a result of Covid-19.
  - The strategy will include a chain of referral to a relevant organisation or an individual.
  - Interviewers should be provided with lists of locations and contact details/phone numbers that study respondents could call if necessary.
- The study team needs to have a trusted source(s) of continually updated information on the Covid-19 situation in their countries – including which restrictions remain in place and which may be removed, etc.

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## References

Samuels, F., Jones, N., Watson, C. and Brodbeck, S. (2015) 'Doing qualitative field research on gender norms with adolescent girls and their families'. Research and Practice Note. London: ODI ([www.odi.org/publications/9817-doing-qualitative-field-research-gender-norms-adolescent-girls-and-their-families](http://www.odi.org/publications/9817-doing-qualitative-field-research-gender-norms-adolescent-girls-and-their-families)).



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**ODI**  
203 Blackfriars Road  
London SE1 8NJ

+44 (0)20 7922 0300  
info@odi.org

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