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What is This?

Comparing telephone and face-to-face qualitative interviewing: a research note

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ABSTRACT This research note reports the results of a comparison of face-to-face interviewing with telephone interviewing in a qualitative study. The study was designed to learn visitors' and correctional officers' perceptions of visiting county jail inmates. The original study design called for all face-to-face interviews, but the contingencies of fieldwork required an adaptation and half of the interviews were conducted by phone. Prior literature suggested that the interview modes might yield different results. However, comparison of the interview transcripts revealed no significant differences in the interviews. With some qualifications, we conclude that telephone interviews can be used productively in qualitative research.

KEYWORDS: qualitative interviews, telephone interviews

Introduction

Researchers who wish to understand the 'complex, interconnected family of terms, concepts, and assumptions [that] surround the term *qualitative research*' (Denzin and Lincoln, 1994: 1) have a large and growing body of literature to consult. The literature on interviewing as a data collection method is particularly robust. This article focuses on one aspect of interviewing: interview mode. As discussed later, interview modes – face-to-face versus telephone interviews, for example – have received a fair amount of empirical investigation. For the most part, however, the mode comparison literature reviewed below has focused on fairly structured, quantitative interviews. Those who are interested in mode comparisons of qualitative interviews will find relatively little empirical work in the area. This research note describes a study that seeks to expand the mode comparison literature regarding qualitative interviews.

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In this study, both telephone and face-to-face interviews were used to gather data from correctional officers and visitors at county jails. The purpose of the interviews was to understand how correctional officers and visitors in county jails view their roles and understand the role of the other during the visiting period at the jail (see Sturges, 1999). The interviews were semi-structured and sought to 'see' the interactions in the visiting waiting rooms through the eyes of the participants.

The original project design called for all face-to-face interviews. As described below, it became necessary to conduct about half of the interviews by telephone. This turn of events presented the opportunity to compare the interview modes, with specific attention to the themes that emerged from the interviews and to the depth of content. Our question with regard to interview mode was whether the quality of the data collected by telephone was comparable to that collected in face-to-face interviews. The use of telephone interviews in qualitative research is uncommon, due largely to concern about whether telephone interviews are well suited to the task.

We sought to investigate the influence of mode in the interviews conducted for this study. Comparison of the interview transcripts revealed no significant differences in the interview data. We conclude, with the qualifications discussed below, that telephone interviews can be used successfully in qualitative research.

THE SUITABILITY OF TELEPHONE INTERVIEWS

Qualitative researchers generally rely on face-to-face interviewing when conducting semi-structured and in-depth interviews. Conducting an interview by telephone typically is seen as appropriate only for short (Harvey, 1988), structured interviews (Fontana and Frey, 1994) or in very specific situations (Rubin and Rubin, 1995). The issue of the suitability of the method is more complex than these simple guidelines suggest, however. Suitability needs to be considered in light of the particular research endeavor. We turn now to consideration of a set of issues that we believe are central to mode consideration and then, in the next section, discuss the findings of mode comparison studies regarding the central issue of data quality.

Sensitive topics Respondents who agree to be interviewed about sensitive topics may prefer the relative anonymity of telephone versus face-to-face interaction with the researcher (Fenig and Levav, 1993). Researchers have reported that telephone interviews increase respondents' perceptions of anonymity (Greenfield et al., 2000). The nature of the sensitivity may matter. For topics that are sensitive because they are embarrassing, interviewing by telephone may increase data quality. Topics that are sensitive because they are emotionally painful, however, may well benefit from in-person interviews. And there is some evidence that studies of illegal behavior, such as drug use, yield better data for some respondent groups when conducted in person

(Aquilino and Sciuto 1990; Aquilino 1992). As McCracken (1988) has pointed out, participation in qualitative interviewing can be 'time consuming, privacy endangering, and intellectually and emotionally demanding' (p. 27). Therefore, researchers may wish to do whatever is possible to maximize data quality while minimizing imposition on respondents.

Access to hard-to-reach respondent groups Respondent reluctance is a well-known fact of interview studies (Creswell, 1998). Telephone interviewing may provide an opportunity to obtain data from potential participants who are reluctant to participate in face-to-face interviews or from groups who are otherwise difficult to access in person (Tausig and Freeman, 1988: 420). In these cases, use of the telephone could make it possible to obtain data from people who would not otherwise have their views represented (Miller, 1995).

Access by telephone presupposes that the group of interest owns a telephone. In many locations – such as the United States, where this study took place – phone ownership is widespread. However, even where the majority of the population own phones, there will be subgroups who do not.² Of course, phone ownership does not guarantee participation in the research project. Participation may require some initial contact either in person (as was the case in the study described in this article), by telephone to solicit cooperation³ or even by mail. Rubin and Rubin (1995) offer some illustrations of how solicitation by mail might work with certain categories of respondents.

Interviewer safety Social science research often involves investigation of deviance or socially disapproved behavior. As such, it may require researcher presence in locations that are unsafe. Researcher safety is too seldom discussed in the methodological literature. In truth, many research settings present some danger to the researcher (see Hamm and Ferrell [1998] for a typology of risks, and Scully [1990] and Blee [2002] for specific examples). Some investigators have lamented the lack of 'good guidelines and methodological strategies for conducting ethnographic fieldwork' in dangerous settings (Williams et al., 2001: 217).

In addition to the safety concerns of the researcher, dangerous settings serve to restrict inquiry. Lee (1995) points out that 'risks posed by fieldwork in dangerous settings have numerous consequences. They shape research agendas by deterring researchers from investigating particular topics' (p. 4). In these cases, telephone interviews may preserve the research endeavor provided the respondent group can be reached by telephone, and that any pre-interview personal contact can be accomplished with adequate safety.

Cost A final obvious consideration is cost savings. Telephone interviewing is a cost-effective method of data collection, particularly when compared to face-to-face interviews located in the respondent's normal environment (Tausig and Freeman, 1988; Aquilino, 1992; Miller, 1995). It should be

equally obvious, of course, that this apparent benefit needs to be assessed in light of the research question and respondent group. Using the telephone may make it possible to collect relatively inexpensive data, but this saving makes sense only when the data are of sufficient quality. Data that are inexpensive but of low quality would not justify any expenditure, however low.⁴

THE MODE COMPARISON LITERATURE

The primary concern when comparing telephone and face-to-face interview modes is in the quality of the data collected. Relatively little has been written about using the telephone with qualitative interviewing. Creswell (1998) notes that use of a telephone deprives the researcher of seeing the respondents' informal, nonverbal communication, but says it is appropriate when the researcher does not otherwise have access to the respondent.

Comparisons of more quantitative data obtained through face-to-face and telephone interviewing have been made in studies of self-reports about alcohol and/or illicit drug use (Aquilino, 1992, 1994; Midanik et al., 1999; Greenfield et al., 2000). Mode comparisons have also been done with clinical and educational research as well as with studies for home economists (Harvey, 1988; Tausig and Freeman, 1988; Miller, 1995).

The researchers who have compared telephone interviewing with field interviewing have generally concluded that telephone interviewing was an acceptable and valuable method of data collection (Sobin et al., 1993) and was successful in obtaining completed interviews (Aquilino, 1992). Comparison of the quality of the data yielded by each mode shows mixed results. Aquilino (1992) found significant differences in the amount of drug use reported (telephone interviews yielded lower reports) and mode differential in racial subgroups. Jordan et al. (1980) reported 'more missing data on family income, more acquiescence, evasiveness, and extremeness response bias, and more and somewhat contradictory answers to checklist questions' (pp. 218–19).

Other researchers report no significant differences in responses (Weissman et al., 1987; Tausig and Freeman, 1988; Fenig and Levay, 1993; Sobin et al., 1993; Greenfield et al., 2000). Miller (1995) concludes that 'telephone interviews are not better or worse than those conducted face-to-face' (p. 37). In addition, using the telephone was found as an effective means to gather sensitive data (Babbie, 1986; Tausig and Freeman, 1988) even when compared with direct questioning (Weissman et al., 1987).

Our experience in the study described here may contribute to the mode comparison literature. As described more fully later, in this study both telephone and face-to-face interviews were used to gather data from correctional officers and visitors at county jails. The interviews were semi-structured, and sought to 'see' the interactions in the visiting waiting room through the eyes of the participants.

Research project methods

The central research questions addressed by the research project described here were: What are the concerns of correctional officers and visitors about the visiting process at county jails, and how do they view the role and actions of the other? The populations for this study were correctional officers⁵ and visitors⁶ from three county jails⁷ in a large northeastern state in the US. The project involved both observation of the waiting rooms in the county jails, and personal recruitment of respondents by the researcher while on site. Respondents were invited to participate in semi-structured interviews regarding the experience of being either a visitor or a correctional officer charged with supervising visiting in the county jail.

The researcher in this study first made in-person contact with potential respondents and handed out letters that explained the purpose of the study. Some potential respondents were reluctant to participate in face-to-face interviews. When it appeared that this reluctance could jeopardize the sample for the study, telephone interviews were offered as an alternative to face-to-face interviews. Participation increased. Respondents were asked to sign a consent form and to indicate whether they wanted to arrange for a face-to-face or telephone interview. Participants were then contacted by phone and a time was arranged to conduct the interviews.

The researcher conducted in-depth, semi-structured interviews with a total of 43 people; 21 involved face-to-face interviews, and 22 were conducted by phone. Nine correctional officers agreed to participate. Six officers participated in face-to-face interviews and three officers were interviewed by telephone. A total of 34 visitors agreed to be interviewed; 15 interviews were conducted face-to-face and 19 interviews conducted over the telephone.

Preliminary questions were based on an interview guide that focused on asking participants about their experiences with visiting jail inmates, but allowed the researcher latitude with follow-up questions and probes. The interview guide also included questions about the interview method, such as why a participant chose to be interviewed either face-to-face or by telephone.

All of the interviews were tape-recorded with the respondent's permission. With face-to-face interviews, a small, unobtrusive tape recorder was placed between the interviewer and the participant. Telephone interviews were tape-recorded using a telephone recording control/device that connects a hard-wired telephone to a transcription machine. All of the interviews were transcribed.

Data analysis consisted of identifying themes from each group at each research site, and then comparing findings across sites. A second coder provided a check for reliability in recognizing and coding themes. The across-site analysis demonstrated some commonality in central themes. For example, at each jail, correctional officers were concerned about security and personal safety. A common theme among visitors across the three sites was a perceived

lack of respect by correctional officers. For their part, correctional officers tended to perceive visitors as 'having an attitude'. Site-specific findings also emerged. One of the jails was severely overcrowded, for example, and the space allocated for visiting was primitive. On the positive side, a correctional officer at one site virtually single-handedly managed to create a welcoming atmosphere for visitors. We also compared the findings by interview mode, and we analyzed the explanations provided by respondents for their interview preference.

Mode comparison findings

In reference to substantive questions about the visiting process, virtually the same amount and quality of data were gathered regardless of whether the interviews were conducted over the telephone or face-to-face. A comparison of transcripts for each method was made. The number of double-spaced type-written pages of telephone transcripts ranged from 3 to 16 pages and the range for face-to-face interviews ranged from 3 pages to 18 pages. The total page count for telephone interviews was 153 pages and the total number of pages for face-to-face interviews was 158 pages.

Data were coded by systematically displaying responses in a matrix with columns and rows. The matrix provided a visual aid that was used to identify themes of the study and assisted in drawing valid conclusions (Glense and Peshkin, 1992; Miles and Huberman, 1994). The matrix also facilitated direct comparison of the two methods of interviewing.

Comparison of responses from participants showed that method of interviewing did not influence the responses. Quantitatively, the number of responses did not vary greatly relative to each question. More importantly for our purposes, the nature and depth of responses did not differ substantially by type of interview.

The following example shows the nature of responses regarding physical conditions of visiting; the responses were very similar, regardless of interview method. Visitors were asked, 'What do you think about the physical environment for visiting in the jail?' At one of the jails, visits with male inmates are conducted over telephones separated by a glass partition. However, visits with female inmates are conducted in adjacent rooms with the inmate standing on one side of an adjoining door and the visitors standing on the other side of the door. The inmate and visitor talk through a small, screened hole in the door. One face-to-face interviewee responded to the question as follows, 'Women would have different conditions, contact visits, where they can sit down in a booth.' In comparison, one telephone interviewee stated, 'In the visiting area girls only have one door, I do not think it is fair.' Thus, both telephone and face-to-face interviewees discussed their concern about the difficulty of visiting female inmates.

Depth of response was generally the same. For example, respondents were

asked, 'If given an opportunity, what would you say to correctional officers?' One face-to-face interviewee responded:

Not so much to do your job as a punishment from the days of old where you had to mete out corporal punishment, physical abuse, the baton, and belligerent language to the family members just because they are visiting someone who has been convicted or not convicted.

In comparison, one telephone interviewee responded:

[Have correctional officers] work on their customer service values because they are here to serve the community, not just to earn a living. How you interact with the public portrays the people you work for. And, they work for the county, and I think a negative portrayal reflects negatively on the county.

Given the marked similarities in the quantity, nature, and depth of responses, we conclude that mode of interview did not influence the data to any significant degree.

The participants were also asked three questions about the interview method that they had chosen: (1) were they satisfied with the research method? (2) did they feel comfortable with their choice? and (3) did they feel they were able to express themselves freely? To each of these questions, all of the participants responded 'yes'. In addition, all of the participants said they appreciated being given the option of choosing either a face-to-face or telephone interview. Of course, we should point out that none of the respondents was in a position to compare interview modes. Still, the fact that no one reported being unsatisfied and quite a few appreciated the choice seems positive.

Respondents gave a variety of reasons for their choice of interview type; their responses can be reduced to two categories – convenience and privacy concerns. The most common reason given by participants for choosing to be interviewed by telephone was because they did not have the time to participate in a face-to-face interview. Instead of having to set up an interview time and make arrangements to be present, they preferred to be called at home. Some participants preferred telephone interviewing because they were 'never home' and it was 'hard to make an appointment [with them]'. Other reasons given for choosing a telephone interview were because a visitor lacked transportation, or the visitor had to look after children. This finding parallels the findings of Fenig and Levav (1993) who found that telephone interviewing allows the interviewer access to respondents who are hard to reach because of work schedules.

In comparison, the researcher also asked the respondents who were interviewed face-to-face why they chose that method. The most common response was that they had time to be interviewed before visiting began. Thus, again, convenience was the variable that influenced choice of interview mode.

As stated, some participants chose telephone interviewing because it afforded a measure of privacy. Visitors noted that telephone interviewing was

more private. One participant said he did not want other people to know he was participating in this study. Others feared that if correctional officers saw them being interviewed, the guards might 'take it out on' their family member. In contrast, correctional officers gave only 'convenience' as their reason.

Fenig and Levav (1993) have stated that an advantage of telephone interviewing is that it provides access to potential respondents who are resistant to face-to-face interviews. This is the situation the researcher encountered here. Fenig and Levav (1993) also stated that 'partial anonymity granted by the telephone may increase the validity of responses by reducing the embarrassment involved in responding to emotionally or socially loaded questions in a face-to-face situation' (p. 1). One finding from this study was the extent that visitors to the jail felt stigmatized by their association with a jail inmate (Sturges, 1999). Telephone interviewing gave the participants in this study more anonymity and this seemed to reduce their anxiety about participating.

As discussed earlier, there were advantages of telephone interviewing for the researcher as well. The researcher did not have to travel to unfamiliar areas. The jails that were the focus of this study were located in urban and rural settings, and safety was a concern in two of three settings due to a fair amount of street crime. Recruiting respondents in the jail waiting room for subsequent phone interviews involves far less exposure to the locale than did the face-to-face interviews. Fenig and Levav (1993) have also pointed out the obvious advantage of telephone interviewing when collecting data from participants who live in 'dangerous locales' (p. 1).

There were technical benefits to telephone interviewing as well. Interviewing in the jail waiting rooms or in another location convenient to the respondent typically did not provide a setting conducive to in-depth interviewing. These settings were often loud, public, and uncomfortable. Because of our surroundings, it was often more difficult to keep track of areas to probe with the face-to-face participants. Taking notes during the interview was often necessary, and it is well established that note-taking distracts from the communication process in face-to-face interviews (Miller, 1995).

Telephone interviews present other challenges, of course. As noted elsewhere, use of a telephone denies the interviewer potentially important visual cues (Miller, 1995). The issue, it seems to us, is whether the lack of visual cues is critical to data quality and whether there are any compensating features of telephone interviewing.

Respondents provide verbal cues – hesitation, sighs, for example – that can indicate that a follow-up question or probe is in order. Even though the telephone interviews precluded probing the interviewees based on visual cues, it was still possible to probe participants. Also, when conducting telephone interviews, the interviewer was able to take notes without distracting interviewees. The interviewer could then probe the interviewee about a specific topic at a later time in the interview. Thus, in this study, telephone interview-

ing made it possible for the interviewer to stay more focused on the interviewee's responses.

A final issue involves being able to assess the nature of the respondents' involvement in the interview without relying on visual cues. While this assessment has an obvious connection to the data collection process, it also comes into play during analysis of the interview data. Undoubtedly, lack of visual cues reduces the ability of the researcher to determine how involved the respondent is, but the telephone does not preclude such an assessment. Once again, the interviewer can note verbal cues such as hesitation, hurried answers and the like, and make notes to guide use of the data.

Conclusion

On balance, our experience with this project suggests that telephone interviewing can be used successfully in qualitative projects. The central question for us was whether telephone interviews can 'stand in' for face-to-face interviews without reducing data quality. In this research project, the objective was to understand the visiting process through the eyes of the visitors and the correctional officers who supervise that process, and both face-to-face and telephone interviews yielded similar information. By providing potential participants with a choice between telephone and face-to-face interviewing, a wider variety of respondents could be included and more information obtained about the visiting process at county jails. Fenig and Levav (1993) also believe that telephone interviewing can be an attractive and cost-efficient fieldwork resource. Telephone interviews can yield good quality data with maximized response rate (Tausig and Freeman, 1988) and thus can be an effective means of data collection (Harvey, 1988).

Some of the success of the telephone interviews in this study is undoubtedly due to specific aspects of the research project. In particular, the *recruitment* of participants was done face-to-face. It is not clear that recruitment by other methods (phone or mail) would result in the same improved access to hard-to-reach respondents. Furthermore, in this project, recruitment followed a period of observation in the jail waiting rooms. Thus, although the researcher did not know any of the officers or visitors who were asked to participate in the study, they may have seen the interviewer in the jail before, and this potential for visual familiarity may have played some role in the recruitment process.

It is also significant that the topic here – visiting loved ones who are in jail – is a sensitive one. Renzetti and Lee (1993) have argued that sensitive research may be different in some crucial ways from research on more mundane topics. Certainly, the desire to be discreet motivated some of the respondents. Recalling our earlier distinction between sensitive topics that embarrass and those that cause emotional upset, we should point out that while incarceration of a loved one is often a very painful topic, the particular issue investigated

here was the experience of visiting, not the totality of the impact of incarceration.

We believe that telephone interviewing can be a useful method for qualitative studies. Obviously, there are research questions that require face-to-face contact with respondents or immersion in their world. It is ludicrous to imagine Elliot Liebow (1993) interviewing homeless women by phone, for example, or Kathleen Blee (2002) calling Klanswomen for a telephone interview. Ethnographers and others whose research depends on close interaction in the environment of the respondent might supplement face-to-face interviews with telephone contact, but most of the data will be collected by often lengthy face-to-face interviews. In other studies, however, such as the one described here, the researcher's interest is more narrowly focused and immersion in the environment is not necessary. In these latter cases, telephone interviews may provide information quite comparable to in-person interviews.

Even with these caveats, it seems worthwhile to consider telephone interviews as a way to enhance qualitative research. Surely advances in technology shape the way we do research, and researchers need to consider how the technology in question fits in the lives of potential respondents. Harvey (1988) has noted the impact that 'norms for telephone usage' can have on research. For a given research topic, telephone interviews make sense when the respondent group of interest owns telephones and uses them for both brief instrumental and longer expressive phone conversations. In that case, to a large extent, the technology is transparent. It seems time to make greater use of *telephone* 'conversations with a purpose' (Kahn and Cannell, 1957) in qualitative research.

NOTES

- Telephone interviews may limit the options of the interviewer to comfort respondents who become emotional during the interview. They may also limit the ability of the interviewer to anticipate such a reaction due to lack of visual cues of respondent distress.
- 2. In particular, members of lower income groups or recent immigrants may lack personal phones. In the US, cell phone ownership has been growing rapidly, and there is now a sizable group for whom the cell phone is the only personal phone. Given prevailing cost structures in which the cell phone owner pays for all calls, including in-coming calls, it seems unlikely that this group of phone owners will be receptive to unsolicited telephone interviews. In general, then, the researcher who wishes to use telephone interviews will need to become familiar with local phone ownership and conventions of usage.
- 3. One of the authors has had some success with cold-calling prospective respondents and scheduling a callback time to conduct a research interview. In each instance, the respondent group involved professionals (e.g. surgeons, attorneys) who were being interviewed about their professional responsibilities.
- 4. We are indebted to one of the reviewers of this article for noting that cost reduc-

- tion is often gained at the expense of quality in result. The reviewer also noted that this trade-off may be more acceptable in a survey project which involves a large representative sample, than in a qualitative study which relies on a smaller, purposeful sample.
- 5. Correctional officers are jail officers who monitor the behavior of inmates and, among other duties, are responsible for supervising the process of visiting.
- 6. In this study, the term 'visitors' refers to family and friends of the inmates. Professional visitors, such as attorneys or clergy, were not interviewed.
- 7. County jails are correctional facilities managed by county sheriffs or county prison boards. They house both pretrial detainees and convicted offenders sentenced typically to terms of two years or less.
- 8. Mail contact would not have worked with the group of interest in this project because it is not possible to obtain a list of visitors to the county jails. Such a list exists, of course, because all visitors must be pre-approved. However, under ordinary research conditions, it would not be made available to researchers by jail administrators.

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