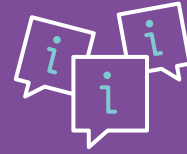




How to do in-person research remotely.

[SOCIAL-CHANGE.CO.UK](https://social-change.co.uk)

Introduction.



The coronavirus crisis and social distancing have forced businesses and organisations to rethink how they work and make changes to accommodate the safety of not only themselves but also their consumers. However, and we may be more than a little biased here, we think that change can sometimes lead to good things.

In our transition to remote working during lockdown, we have looked for new and innovative ways to continue conducting important research. Through doing this, we not only found great new remote ways of conducting research using methods traditionally done in-person, but have also realised that there are a wide range of benefits to doing research remotely.

From increased flexibility to being able to re-live qualitative sessions, doing research remotely can offer many benefits to outweigh its challenges and we're very excited about using these innovative methods in our current projects and into the future.

In this guide, we give you a quick overview of how some in-person research methods can be transferred to remote means. However, before we dive into these methods we've provided you with some tips which we think are key to completing remote research successfully. So, give the guide a read, and if you want some more information about how we're continuing to do research remotely, check out our statement **here!**

Key tips for remote working.



Remote research and informed consent

Informed consent is obviously a **must** for all research. Your participants need to know what you are researching and why, what their role in the research will be, how their data is going to be used and shared via reporting and the steps you will take to ensure their anonymity. Once participants have been made aware of this, they need to provide their **informed consent** to take part in this research, for example by signing a consent form.

This information you provide to participants should be reviewed before you go ahead with your remote research. Think about the following:

- Do participants need to download and install additional software? If so, what software and how?;
- Do participants have the relevant technology or materials required? If not, how can they get this / how can you send it to them?;
- How can guides be produced so that participants know how to use the technology, materials or software involved?;
- Are amends to existing privacy statements or an updated privacy statement required to cover the technology, materials or software involved?; and
- How will you obtain participants' consent to being recorded?

This last question is of particular importance. **In addition to providing informed consent, your participant must consent to being recorded.** So, when obtaining someone's informed consent to participate, you must also gain their consent to being recorded. It is also good practice to ensure participants are still happy to be recorded before pressing the record button during your research sessions.

As the research will be conducted remotely, your participants will need to fill in the relevant forms and email them back to you both before they participate in the research and before you send any details or materials for the research session (other than the agreed time and date of course).

Have good, open communication

Having regular communications with your participants in the lead up to (and during in some cases) your research is essential. It is important to be flexible and readily available to participants who may need support in using the software, technology or materials involved in your research. If the research is too difficult or not feasible for them, they are unlikely to participate further.

Encouraging your participants to be open with you is important not only for the research study itself but also for your own experience. Being able to gather feedback from participants' experiences and understanding any problems they faced will help you to perfect your remote research for future studies.

Have at least two researchers for video calls

Conducting remote research can be quite the cognitive load for one researcher. If you are doing a video call, for example, you will need to facilitate the session, watch the chat for private messages, watch your emails and listen out for your phone in case anyone is having technological issues, and make notes on the session as it happens. Like I said, it's a lot.

This cognitive load can be easily mitigated with a second researcher. Whilst one can facilitate and make notes, the other can observe, be on hand for technical issues and be available for anonymous and / or private messages from participants through the chat. Where necessary, they can then flag this up to the facilitating researcher.

Prepare, prepare, prepare

Although preparation is key for all research, we thought we'd emphasise the point. The way in which you are implementing your research methods may be different, but not much else has changed and nor should it. All research faces potential risks and challenges, and although we're loving remote research methods, they are no different.

Remote research has some definite advantages and can actually mitigate some risks presented by in-person research, though it does present its unique set of challenges. However, thoroughly preparing for your research sessions and following our key tips can easily mitigate these risks and make the advantages worth it. Now, onto the research!

The research methods.



Drawing



The method

This method is quite self-explanatory. You provide your participants with a concept relating to your topic area and ask them to draw it. You can even ask them questions during and / or after the drawing session so to probe further into the thought processes which underpin their interpretation of the topic area. This method is particularly useful for young children and other audience groups who have difficulty verbalising their thoughts; this is particularly true for tough topics which some may find difficult to talk about.

Facilitating drawing remotely

The first route for conducting this research remotely is through the use of video call, which provides two options. The first would be to ask the participant to use a digital software, e.g. Paint, and share their screen with you as they are creating their piece of art. The other option, which would be useful for those less confident using digital software or without access to such software, would require another person to video the participant as they are drawing on a piece of paper, so that the researcher can watch. Both of these routes allow the researcher to not only watch the participant's progress, but also ask questions throughout to gather insight in real-time.

The second route for conducting this research remotely would require your participant to complete a drawing, take a photograph of this (or scan it onto a computer) and then email it over. You can then have a short telephone call to ask the participant questions about the drawing itself and allow for reflection from the participants. If possible, we would recommend the former route of doing this research remotely, as you can gather both real-time and reflective insights from participants.

Although conducting this method remotely seems quite complex, it's definitely worth doing. Due to the reduced presence of the observing researcher and the fact that participants will be completing the activity in the comfort of their own home (as opposed to an unfamiliar location), participants may actually feel more relaxed when completing the activity, and so their drawings may provide a more accurate reflection of their thoughts and feelings.

Focus groups



The method

Focus groups involve getting a group of people together to discuss and debate questions relating to your research topic. This group of people can be of similar or varying demographics and background depending on the audience(s) which you want to represent with your findings. Due to the in-depth nature of these discussions, focus groups can typically last for up to two hours, if not longer!

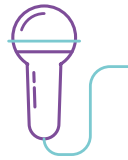
Conducting focus groups remotely

Focus groups can be easily transferred to remote means through using an online video call service. Provided all of your participants have access to the internet and a device with a camera and a speaker, you can arrange to hold a video conference call. Participants will have the option of either using their video or leaving their cameras turned off so to maintain increased anonymity. Additionally, there are chat functions available in most video calling software, which provides an added benefit to remote focus groups. Participants can use this to contact the researcher privately and share feedback which they may not feel comfortable voicing in front of the whole group.

When hosting a remote focus group, it is important to have software which not only allows video conference calls but can also record these. Although an audio recording would be sufficient, it is worth investing in software which can also do a visual recording as it will allow you to re-watch the session and look at body language and facial cues.

Good facilitation is key to a successful focus group, and this may seem more daunting in a virtual setting. Group research is very different from one-on-one methods and it's important that participants feel confident to engage with the session and are reminded about respectful behaviours when talking and engaging with their fellow participants. Unlike with in-person groups, video conferences allow the host to mute certain participants or remove them from the call. There shouldn't be a need to use these tools and we wouldn't recommend using them unless in extreme circumstances. However, setting out clear rules at the start of the session and highlighting these tools can help to not only ensure that people remain respectful of one another, but also make others feel confident to speak in a way that cannot be replicated in-person.

Interviews



The method

Conducting an interview simply means to have an open conversation with individual members of your target audience around your research topic. Your interviews can either be semi-structured (having a set questions with the freedom to follow up on answers) or unstructured (having a topic guide rather than set questions so to facilitate a free-flowing conversation), depending on the conversation which you would like to have. However, we would personally recommend using semi-structured interviews to ensure your conversation remains relevant for the insight you want to capture.

This particular research method has a remote option which is already established. However, there are some researchers and clients who prefer the traditional, more personal route of conducting these in-person and face-to-face.

Conducting interviews remotely

Interviews are very easy to do remotely without the need to install any further software. All you need is a phone, some form of voice recorder or dictaphone and the participant's consent to being recorded. If you prefer the face-to-face approach however, there is the option of video calling your participants. This would require secure video calling software with the capability to record the conversation; you would of course need the participant's consent to do this. All you need to do is call up your participant, ensure your participant consents to being recorded and then crack on with your interview!

If your participants have consented to the interview but not to the recording, you will have to make notes of their answers. Although this will likely prolong the interview, this should be no different to when a participant declines to being recorded during an in-person interview. However, it would be beneficial to tell participants when you're making notes so they not only know you have been listening, but that you are still on the other end of the line when you go quiet for a while.

Although remote interviews can fall victim to connectivity issues, they are worth exploring. By removing the need to travel to a specific location, interviews can be more flexible to a participant's schedule, which is particularly useful if doing research with professionals. This flexibility will make the research more accessible for the participant, in-turn making them more likely to engage.



Diary keeping



The method

Diary keeping is pretty much what it says on the tin. You ask your participants to keep a record of a given experience relating to your topic area. This could be the experience of doing a particular task related to the research or simply recounting their day and any events which may have occurred. This is valuable to use as it allows you to experience things through the eyes of your participants. Once the research duration is complete, participants simply submit their diaries to the researcher for analysis.

We're not sure about you, but when we hear 'diary' we usually think of a red, leather-bounded notebook. However, we've recently considered how diaries, and therefore this particular research method, can make a long overdue entrance into the modern world.

Keeping diaries remotely

There are two ways in which diary keeping can be done remotely. The first, and perhaps the easier method, is to ask people to type up their diaries rather than write by hand. They can use notes or Microsoft apps for this, or even type up their entry in an email to send to the researchers straight away.

The other option would involve asking participants to make a video diary at the end of each day. They would then submit this to the researcher, who would make a compilation of all of the videos. Although there is the challenge of needing participants to make these diaries on a regular basis for the duration of the research, this is no different from handwritten diaries. However, if you were to opt for video diaries, you can actually see participants recounting the day's events in their own words, inclusive of facial cues, which provide further insight into participants' experiences.

Getting participants to regularly make diary entries can be a difficult feat, particularly if the research duration is long; this will put participants at risk of fatigue. However, this can be mitigated through regular contact by the researchers to not only see how the participants are finding the experience but also to provide gentle reminders to complete their diary entry. Being readily available to your participants to talk through any issues they may be having makes all the difference.

Observation



The method

True to its nature, observation simply means to observe (or watch) your participants within their natural environment, or within a condition put in place by the researcher. Studies set within the participants' natural environment would require natural observation, with a researcher following them around, making notes on behaviours and actions to explore in more detail through short interviews later on. Studies which provide participants with a given situation (or a task) can be conducted in a particular location, with researchers watching them in this scenario.

Conducting observation remotely

Depending on which type of observation you have planned, this can be tricky to do remotely. If your study provides participants with a given condition or task, this can be done through video calling or screen-sharing. For example, if you would like your participant to complete a puzzle alone or within a group, you can hold a video call with those involved and record the session as they discuss and complete the task.

Natural observation, however, can be a little trickier to transfer to remote means as it typically involves being with the participant in their everyday environments. The remote alternative to this can be framed as a homemade documentary in a 'vlog' style. Participants would be requested to make short videos after an event or situation.

Whilst it's true that ensuring participants make these homemade documentaries as often as required can be a challenge, it can be invaluable if done successfully. Not only will this method show an experience through the eyes of the participant, but as there is no shadowing researcher, it may feel less invasive to participants. This could make them act more naturally rather than in ways in which they think the researcher wants them to act; in other words, it can reduce the chance of a participant displaying response biases.

Play



The method

The explanation for this method is pretty straightforward. You provide your participants with a toy that has some relevance to your research topic and ask them to, well, play with it. You can either give participants a scenario to play out or simply give them the toy and leave them to play with it as they wish. You can observe this from a distance (usually behind a one-way mirror) and then ask them questions as the play session unfolds and / or once the session has come to an end. This method is mostly used for research which involves children and can be particularly useful for young children who struggle with verbal communication.

Facilitating play remotely

There are two ways in which this can be done remotely. The first, and perhaps the more efficient, is to video call participants and ask them to share their screen as they take part in an online game. You can then watch through your screen and ask questions where relevant. The second method would still utilise video calling, but rather than sharing screens you would watch the participant play with the necessary toys in their own environment. However, it goes without saying that unless they already have the materials required, you would need to arrange to have the object of play sent over to them.

Having to send the object of play may throw a little spanner in the works, but it's worth it if it means participants can play in their own environment. Playing in an unfamiliar location, under the careful watch of a researcher (either in the room or behind a one-way mirror) can be quite daunting for participants and will be more likely to elicit some form of response bias. In the comfort of their own home however, they are more likely to be at ease and therefore play in a way which is more natural and truer to them, thereby producing richer insight.



Survey



The method

Put simply, a survey involves asking participants to answer a set number of questions around your topic area. You can have a mix of questions which can collect different types of data; set-response questions for quantitative data and open questions for qualitative.

Although the majority of our survey work is done online, we recognise that some prefer a more 'boots on the ground approach', visiting houses and approaching people on the street. We've therefore included surveys in this guide to help those who prefer this approach.

Conducting quantitative surveys remotely

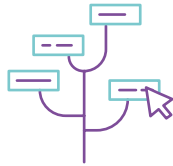
There are two approaches to conducting surveys remotely. The first involves calling people to ask for their participation and then once they have given consent, going through the survey questions with them over the phone and using their answers to complete either a paper or digital version of the survey form on their behalf.

However, we'd recommend the second approach of conducting an online survey through a digital platform which is compliant with GDPR. You can upload your survey onto one of these platforms and add in rules where the completion of certain questions is dependent on a participant's response to a previous qualifier question.

We definitely think online surveys are the way to go regardless of whether in-person research is available. Online surveys allow you to reach a much bigger audience in a shorter amount of time. You can use all kinds of mediums to market the survey including social media and newsletters to encourage participation, the former of which has advertising options which allow you to specify your target audience. Online surveys are also a great way to build stakeholder relationships by asking them to get involved in supporting and disseminating the research to their audience, service users and customers etc.

It should be noted that not everyone will have both the internet access and the digital literacy skills required to complete an online survey. However, this can be mitigated through the telephone approach mentioned above. This allows you to maximise the opportunity for participation by your target audience.

Tree testing



The method

Also known as 'reverse card sorting', tree testing is a user experience methodology which asks participants to navigate a website using, well, its navigation menu. This and the website are stripped to their basics, without any additional website design or detail which may skew the results. The method explores how easy websites and applications are to use by asking participants to use this basic navigational menu to find a particular item on the website. Researchers watch participants as they do this and ask questions so to explore why participants are going down particular routes.

Tree testing remotely

Tree testing is something which can easily transfer to remote means. The researcher can still watch the participant complete their task, but through a shared screen rather than over their shoulder. Participants need to be given access to the stripped back website and can engage with the researcher through a video call. They can then share their screen as they go through the website and continue to converse with the researcher throughout.

When conducted in-person, this method can seem a little invasive and uncomfortable for some participants due to the fact that the researcher is standing beside them watching their progress. This can not only be off-putting for participants but if the researcher unconsciously gives off facial or verbal cues, this can also lead to various biases impacting the results. By doing this through the screen however, the researcher can turn off their camera and mute their microphone so to reduce the potential for any unintended facial or verbal cues to influence the participant. This reduced presence will not only mitigate the risk of biases but may also make the participant feel more comfortable when participating in the research.



Usability testing



The method

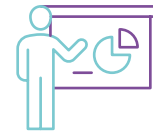
Another user experience methodology, usability testing explores how easy a particular product is to use. It involves asking your participants to complete a task or activity whilst engaging with the product in question, such as a website or an app. This is observed by a researcher, who can ask questions as they go to explore their experience with the product even further.

Undertaking usability testing remotely

As this method already requires some form of technology, transferring it to remote means is easier than other methods. For products which use devices allowing for video calls and screen sharing, you can follow a similar method to that highlighted in 'tree testing', which involves asking participants to share their screen as they navigate the product and complete the task. If this is not possible, you can speak to your participant over the phone and ask them to describe what they are doing as they complete the task. You can make notes of this and recreate their process with your own device so to better understand what they are doing. Both routes allow the researcher to remain in contact with the participant so that they can continue to ask to explore and ask questions around a participant's experience.

This method faces challenges when the device in which the product is based cannot allow screen sharing, but this can be easily overcome through the use of a telephone or video call. Akin to tree testing, the fact that the researcher can have a reduced presence in this methodology may in fact improve participation and reduce the possibility of biases. The fact that the participant will be completing the task from a location which they are more comfortable in may provide truer results, as they are engaging in very similar situational circumstances in which they would use the product in future.

Workshops and co-creation groups



The method

Workshops and co-creation groups are very similar to focus groups, but along with (or instead of) having an open discussion, participants are asked to complete a given task. This may be a problem that they have to solve, worksheets to complete, or a creative campaign concept that they discuss and feedback on as a group.

Conducting workshops and co-creation groups remotely

As with the method itself, conducting workshops and co-creation groups remotely is very similar to conducting a remote focus group. Similarly to focus groups, you will need to arrange a group video call with your participants, allowing them the option of turning their cameras off and using the chat function to voice anonymous opinions. However, the software which you use for these methods must have a screen sharing capability so that you can show the group the task they need to complete on your screen. How can people feedback on a campaign concept if they can't see it?!

In terms of recording the session, audio recordings will be sufficient in most cases. However, a visual recording will likely be necessary in cases where the task is interactive so that you can re-watch the process. As with all methods utilising video calling software, we would recommend considering the use of those allowing you to make a video recording so that you have the opportunity to revisit the session and observe participants facial cues and body language, which may provide more insight than their verbal answers.

As mentioned in our 'focus groups' section, good facilitation is key to the success of group research, including workshops and co-creation groups. Like with focus groups, having that initial conversation with participants before the session begins, outlining clear rules and circumstances in which you may use the mute and remove from call tools (whilst also emphasising this is unlikely to be necessary), will both help to ensure the session runs smoothly and reassure nervous participants.

Challenges and advantages.



Remote research is a valuable alternative to in-person research and can prove to be beneficial for a number of reasons. However, as with in-person research, there can be some challenges to overcome. Below we have detailed some of the general challenges and advantages you may face when conducting research remotely.

Challenges



We think remote research is a brilliant and more than feasible alternative to in-person research. However, objectivity is in our nature, and so we wouldn't be doing our job as researchers if we told you there are zero challenges involved.

Technology can be fickle

Our first challenge lies in how fickle technology can be. You'd think our reliance on technology and connectivity in the modern era would mean that basic issues would have been eradicated, but this is unfortunately not the case. Poor quality technology and / or connection can cause a wide range of issues from a pixelated and jumpy video and gaps in conversations to a call cutting out completely. The best way to mitigate this would be through the communications you have with your participants before the research; use this as an opportunity to test, address and highlight any concerns, particularly around the technology and connectivity involved.

Digital literacy

Although technology has embedded itself into all corners of life, not everyone has the same level of digital literacy skills. Some may have already used video calls and so will easily be able to navigate these, but this is unlikely to be the case for everyone, especially for those who rarely use technology. To mitigate this, ensure you maintain communication with your participants before the research to understand the extent of their digital literacy skills. You can provide participants with additional support through guides and telephone calls to ensure that the research is just as accessible to them as it is to the rest of your target audience.

Access to technology

Thinking about the above challenges brings us to our final challenge; working from the assumption that everyone has access to the technology and connectivity required for remote research. This can not only prove to be one of the biggest challenges but also the hardest to work around. Sometimes, an alternative, more common technological route can be taken, such as calling people to complete an online survey on their behalf. Otherwise, you may need to find ways in which they can access the required technology.

In extreme cases, this may include sending them something in the post which they can complete and then return. Alternatively, you can ask if they would be able to borrow the required technology from family members or close friends. If all else fails, then don't worry, in-person research isn't going anywhere. Sometimes, in-person research appears to be the most appropriate, if not the only, option. If this is the case, then just crack on with your in-person research following best practice in a socially distanced world! The strength of a researcher lies in their ability to adapt and even in a socially distanced world, in-person research is still possible, just a little differently.

Advantages



Although there are a few challenges to consider when conducting research remotely, these largely relate to the technology being used rather than the research itself. We think that the benefits to remote research largely outweigh its challenges.

Flexibility and accessibility

First of all, remote research is both flexible and accessible. It is not tied to a specific time and location as with in-person research. By using remote research, researchers can plan their studies around what works best for the target audience as opposed to the limited time made available by a venue. This allows for maximum participation from the audience as they are more likely to be able to attend the research session.

By not being tied to a specific location, remote research can be made more accessible for all those involved. Not only will it eliminate the need for travel (which is better for the environment if cars are not being used), but it also allows researchers to engage with people from a wider geographical area including different areas of the country, which is particularly useful for national research.

Cost-effective

The next advantage of remote research is that it can be more cost-effective for both researchers and participants. Much of the costs associated with conducting or participating in in-person research is removed when transitioned to remote means, such as the printing and production of research materials, venue hire, transport and travel. This can actually make participating in research more appealing to people as they can feel like their voices will be heard and that they will be helping someone without having to pay for travel, whether through the use of public transport or petrol.

Play back

This particular advantage is specific to remote methods using video. One of the best things about in-person research is that you can observe participants' facial cues and body language when they respond to a given question or situation, which can give key insight into their thoughts and feelings around the topic area. Unfortunately, unless filmed, these cannot be revisited. However, remote methods often require participants to submit a video or take part in a video call, which can be recorded. As such, remote research provides the advantage of being able to revisit research sessions purely to observe participants' facial cues and body language, which can lead to a greater wealth of insight.

Greater anonymity

Finally, remote research can in most cases allow an increased anonymity for those who take part in the research. This not only provides further assurance and peace of mind to participants, but will also make them more likely to engage with the research in the first place. This is particularly true for methods conducted with groups, especially when sensitive topics are involved; participants who have concerns about being recognised or seeing someone they know have the option of using an anonymous alias and turning off their camera so not to be seen. This isn't possible in an in-person setting, as they would have to be face-to-face with their fellow participants – unless everyone wore different Halloween masks that is, and I can't see that happening any time soon...

Conclusions.



You may have noticed that the above methods predominantly relate to qualitative, ethnographic and user experience research. This is because quantitative research is already well-established in remote working due to the breadth of statistical tools available to support us in interpreting and analysing our numerical data. The same cannot be said for research that goes beyond numbers, which may provide a reason as to why these research methods are still predominantly conducted in-person.

Most, if not all aspects of our day-to-day lives have embraced and utilised the technology available at our fingertips, so why not research? It's about time traditional research began to catch up to the modern era because with all the technology of today, conducting research remotely has never been easier! All you need is a hint of flexibility and an openness for change – who knew we'd be advocates for change!?

If you're ready to join the world of technology and explore how you can kick off your project remotely, then **get in touch with our team through our project planner today!**

We only work with organisations that want to bring about positive social change, and people who want to do good. This is you... let's work together.



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