What We Talked About When We Talked About Remote Qualitative Research

A practical note on doing participant-centered
remote qualitative research with low-income communities

The COVID-19 pandemic has **transformed** the way we do our research. With the encouragement of physical distancing and limitation of travels, we are required to shift into doing research remotely.

There are many guidelines and think pieces on how to take qualitative design research remotely (we particularly like these resources from FutureGov, IDEO, and Deborah Lupton), but they don't focus on low income or low tech communities.

So in this guide, we ask "How might we design remote qualitative research that places the low-income respondents at the centre of the design, underlining their wellbeing and technology usage, and result in high-quality output?"

About this Note

In this note, we provide practical recommendations on the data collection phase of the remote research, from the preparation to the process of doing interviews and other data collection methods.
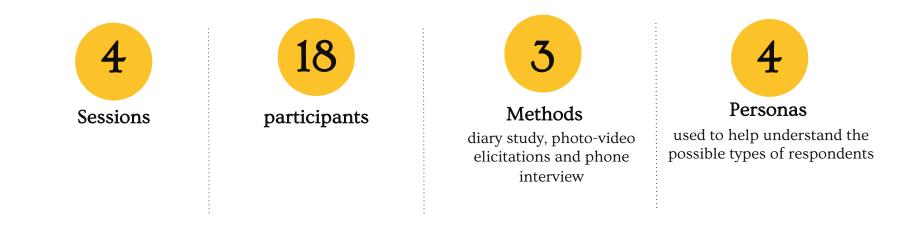
It's not designed to be exhaustive and should be considered a living document, potentially be updated in the near future based on the experience of conducting remote research.

The idea of initiating the note goes back to our our learning network sessions with Empatika.

PLJ x Empatika Learning Network

During the month of June 2020, Pulse Lab Jakarta and Empatika conducted a learning network series to find out what it takes to run a respondent-centered remote research that is suitable for Indonesia's rural areas with respondents from the low income communities. The learning network consist of:

4

Sessions

18

participants

3

Methods

diary study, photo-video elicitations and phone interview

4

Personas

used to help understand the possible types of respondents

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Setting The Context

Guiding
Principles

Remote Research
Phases

From the learning network process, we construct **two guiding principles** on remote qualitative research to inform the research design and implementation.

Guiding Principle 1:

Prioritize the participant's wellbeing when engaging in the remote study during a pandemic

Participating in remote research during the pandemic might not only be new and challenging for researcher, but also for respondents. Spend more time on preparing for a remote research, understand first about wellbeing of the respondents. Use research ethics to guide and decide whether to involve certain respondents in the study. Ethics guide can also help to decide whether to carry on with the research, postpone or even cancel the activity during the pandemic.

Guiding Principle 2:

Design research tools and protocols that can accommodate the most basic communication channel.

Communication technology such as video calls and real-time collaborative tools are mostly benefited by people in big cities with good infrastructure. For communities in the rural areas, things might be different. Get more information about the gadgets and communications tools used by respondents, understand their use of internet and the signal strength. Design for several scenarios of research tools and protocols, then test them out.

We structured the following sections based on the phases of qualitative data collection which involve interaction with respondents. The steps are not meant to be exhaustive and only include ones which we see essential to highlight when doing research in a remote setting.

Preparation → Implementation → Wrapping-up

Preparation Stage

Preparation Stage

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1. Yes, you still need to start with a literature review

- We're already couple months off from the beginning of the pandemic and there might already be many research related to COVID-19, especially on how the pandemic impacted communities. Find what literature is already out there and design a different and specific angle for your research.
- The pandemic impact communities differently. Some lost their jobs, and others are going through changes in their household dynamics. Learn what studies say about the impact of the pandemic so you can design more sensible remote research that places respondents at the centre of your research.

Preparation Stage

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2. Remote Research Tools and Protocols: who are you designing for?

- The first thing you need to think of is understand who you are designing your research tools and protocols for. Respondent might vary, so ask who are your respondents, what are their background, characteristics and how do they use their gadget and other technology usage?
- One of the major challenge in doing research remotely is the communication with respondents. Find what channels and tools that are most effective and tailor it based on your respondent's characteristics.
- To overcome the communication problems that might arise during interviews, consider creating a shorter and clearer interview guide to make your sessions with respondents more effective.
- Think about creating information brief for respondents and also for the researcher team. Share the guide with your respondents a couple of days before the first briefing to give them ample time to prepare.
- The information guide could also come handy when respondents need to explain to their family members or friends about their participation in the study.

2. (we're still on...)
Remote Research
Tools and
Protocols: who are
you designing for?

- Help respondents feel comfortable during the interview by limiting a maximum of two researchers participating in a session. To enable other team member access to the discussion, set up recording tools in smartphones, computers or your regular voice recorder.
- But before you record your interview, make sure your respondents agreed and approved the consent form. Design of consent form for remote research might look different from the usual in-person research. Consider creating one that is suitable with your respondent's characteristics and their access to technology. Consent for remote settings could either in the form of electronic document shared through email, Whatsapp or approval that you record verbally.
- Think of a proper incentive for your respondent's participation. Since communications during research are mostly done through their phones, consider providing incentives in the form of phone credit or mobile data package that are partially provided at the beginning of the study.

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2. (we're still on...) Remote Research Tools and Protocols: who are you designing for?

- When developing the tools and protocols for remote research, we need to understand that the characteristics of respondents might vary based on their technology savviness, communication behaviour and time availability. Below are the different points that can help you guide your design:

Technology

Network Coverage
- Very low
- High only at certain time
- High only at certain places

Technological Behavior
- Tech-Savvy
- Average User
- Low Tech Literacy

Technological Device
- Smartphone
- Feature phone
- One smartphone for all family members

Personality

Communication Style
- Reserved
- Talkative
- Neutral

Role in The Community
- Local authority
- Active community member
- Common community member

Time

Availability
- After work (night time)
- Uncertain schedule
- Available at any time
- Available but multitask

Preparation Stage

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3. The tools we recommend in doing remote research.

In doing remote qualitative research, we recommend a combination of phone interview, diary study, and photo/video elicitation. Although today's use of technology is considerably high, access to technology are unequal where people in rural areas may have lower access. The range of methods of phone interview, photo/vid elicitation, and diary study and its combination aims to cater for different feasibilities for different areas. Consider using tools that are more suitable and familiar with the respondents, such as as phone call, text messaging (SMS), WhatsApp, and Facebook.

Preparation Stage

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4. What to consider when you are designing your <u>Phone Interview session</u>

- Phone interview might be the most basic option for communicating with your respondents. Make sure to have this option available for all respondents.
- Remote research might include more sessions than the usual in-person research settings. Moreover, respondents might be occupied with the WFH activity or other tasks in their homes. So help respondents prepare by creating and sharing the interview schedules with them in advance, at least a day before.
- Your respondents in the rural areas might not enjoy a stable phone or internet signal. Anticipate this issue with shorter interview duration (max 20-30 minutes).
- With the shorter interview duration, expect more sessions and possibly longer research timeframe.
- To avoid confusion from your respondents and the research team, create scenarios and protocols on what to do when connection problems occur. The options could be the maximum waiting time needed, reconnection efforts, or rescheduling the session to other time.
- The less tech-savvy respondent might need help from a family member in using their phone features. Establish protocols when intermediaries or family members are required to assist respondents.

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5. **What to consider when conducting Photo/Video Elicitation**

- Photo-vid elicitation offers a different angle of getting insights and engaging with respondents. For some respondents, it might be seen as a more interesting, creative and easier way to share information during the research process.
- Photo-video elicitation can also serve as a channel for respondents who doesn't feel comfortable participating in interviews or communicating verbally.
- The downside is, sending pictures and videos can be challenging for those living in areas with poor mobile connection. Check with your respondents especially on the smartphone they use and their internet connection before deciding to use this method.
- To ensure participant's safety, make sure you develop protocol for storing and securing photo/video shared by them.

Preparation Stage

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6. Thinking of Doing a <u>Diary Study?</u>

- Diary study is a good complementary option for other research tools if we want understand the details in the respondents daily activities or how the pandemic might impacted their lives. Regularly logging in respondent's experience into a book or other formats can provide a more granular and richer information from the respondents.
- Diary would be more suitable if you have longer time in collecting data from your respondents. Check whether your research time frame allows including a diary study before deciding to do one.
- Diary study also takes more effort for both the researcher to prepare and the respondents to do. If you decided to do one, make sure that diary are user-friendly designed and can be intuitively navigated and logged by respondents.
- Check with your respondents whether they are comfortable in participating in a diary study, as doing a diary study would take more of their time and effort.

Preparation Stage

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6. (we're still on...)
Thinking of Doing
a Diary Study?

- Similar to photo/video elicitation, diary study provides a media for respondents who are less comfortable in expressing their mind directly/verbally.
- Diary study relies on other complementary methods, such as following up with an interview once diary logs are completed by study participants
- Try adjusting diary design into respondents' tech familiarity. Diary could be in a form of Whatsapp chat, SMS, or voice notes.

Preparation Stage

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7. Recruiting Respondents for a remote research, how different will it be?

- What would you do when you get a call from an unknown number? Your reaction might be the same with your potential respondents when they get a call from someone they haven't heard before. Recruiting respondents for remote research during the pandemic might be a challenging task as participants might be reluctant to participate in a study with someone they haven't met in person before.
- As a strategy on the problem above, consider recruiting research participants from previous studies when possible and relevant.
- Another option is to snowball, reach out to other community members, government staff, local fixer, or local NGO to recommend potential respondents in their community.
- For remote research consider recruiting fewer respondents but go more in-depth.

Preparation Stage

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7. (we're still on…) Recruiting Respondents for a remote research, how different will it be?

- Having a backup of respondents is also important as some respondents might withdrew due to various reasons. Be ready by having a list of backup.
- When recruiting respondents, we might be tempted to recruit participants that own phones. But phone usage in the rural areas might be different. Don't dwell too much on respondent's phone ownership, instead focus on their access to phone. Some family use communal phone which are shared among family members.
- To avoid interview or survey fatigue from the respondents, consider recruiting those who are not recently involved in a similar research, especially during the pandemic.

Preparation Stage

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8. Make sure to pilot all remote research tools over all relevant channels

- <u>Take notes</u> of the hiccups when testing the tools and other aspects that needs to be improved based on pilot result.
- Monitor the <u>time spent</u> for each sessions as we want to have the actual sessions short and on schedule.
- Consider testing the tools with your colleagues that are based in the rural or different cities to create a more realistic testing environment.

Implementation Stage

Implementation Stage

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1. Establishing initial contacts with Respondents might be the game changer

- Initial contacts with respondents could be a decisive moment for respondents in deciding their participation. Plan and strategise well for the session. Think of factors that might prevent respondents to participate and how you would respond to that factors.
- Initial contact should be about rapport building and also understanding about the technology usage and communication preference of the respondents. The session should not include questions that are intended for in-depth interviews, which should be scheduled for the following session.
- Receiving new information at the first session can be quite overwhelming for respondents. Try to communicate as transparent and clear as possible, use informal communication style to avoid being intimidating. Be sure to enable a relaxed environment in the initial session to avoid respondent's emotional distress.
- When possible, consider having the briefing session through video calls to help build rapport with respondents and make them feel more comfortable and gain trust.
- Don't forget to explain briefly to the respondents about the study, expectation from their participation in the study, timeline, and next session objective.
- Encouraged respondents to let the researcher know when they feel uncomfortable during any phase of the study. Inform them that the researcher are very mindful about the respondents wellbeing, especially when participating in the research.

Implementation Stage

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1. (we're still on…)
Establishing initial contacts with Respondents might be the game changer

- Explain to the respondents that the interview and other interaction between researcher and respondents will be done remotely through the agreed channels.
- Ask respondent's concerns about their participation in the remote study
- Explain about the consent form required in the following session
- Inform that there will be incentives provided for their participation in the study and confirm whether they are alright with such incentives.
- Despite having piloted the research tools, the initial contact with respondents is a good opportunity to see their response on the tools used. Leave room for possibilities of adjusting the tools based on the respondent's input.
- Learn about the communication style of respondents, pay attention to vocal tones such as pauses, spontaneous reaction, and emotional cues to replace the non verbal cues. This would be helpful in adjusting the tools to be used when interacting or interviewing the respondents in the following session.
- Plan the first session to be brief and stick to the time allocated.

Implementation Stage

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2. Sending out reminder and check-in with respondents

- Since the research is done remotely, distraction may come easily both for respondents and research. Make the experience in participating in the research easier for the respondents by providing reminders and do regular check in with them.
- Important reminder especially on the agreed time for calls, sent at least the day before.
- Reminder also applies for interview sessions, logging in of diary when applicable and also sharing photo/video elicitation.
- To save time, craft a research reminder template that can be re-used whenever possible.
- Options of sending out reminder would be through platform that respondents are most familiar with either WhatsApp or text Message.
- Motivation of the respondents comes and goes, especially during remote research in a pandemic. Use the opportunity of sending reminder to also get the pulse on respondent's mood in participating in the study.
- Ask respondents to contact researcher whenever they feel confused about the instruction or related to their participation in the research
- Respondent's daily schedule vary, agree in advance with them on the best time to send research reminder.

Implementation Stage

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3. Conducting interview with respondents

- Help respondents understand clearly about the research by start with explaining again about the objective of the study and expectation on the interview session, including the time allocated.
- Inform respondents that they are welcomed to let us know if they feel uncomfortable during the interview and they are free to cut short the session if needed.
- Explain about the consent needed and make sure respondents agree before continuing the interview. Consent should also include agreement from respondents on recording the remote interview.
- Agree about the steps needed should there be problem with communication or phone/internet signal.
- Interview sessions should be used as an opportunity to discuss about the photo/video and diary study that participants were involved in. It's an opportunity to clarify and dig deeper about those data.
- Good luck with your interview!

Wrapping up

Wrapping Up Stage

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1. Have a final session to wrap up respondent's participation in the research.

- This is an opportunity to thank participants for their involvement in the study and ask their feedback.
- Wrapping up of research could be done either at the end of an interview, for respondents that are only involved in an interview, or a dedicated session where respondents are involved in several activities of the research, such as diary study and photo/video elicitation.
- Appreciate and respect respondents for their time, effort, support, and dedication in research
- Explain to them about next steps of research
- Explain about the incentive disbursement or even doing the actual disbursement if you haven't done that
- Make sure to create a receipt for incentive disbursement from the respondents, as your admin or finance colleague will ask for it later
- Share contact details of who respondents can contact after the final briefing
- Ensure all documentation needed are completed. Do you have all of the consent form, photo/video, diary submitted by the respondents?
- Participants are at the centre of your study. Ask their feedback about their participation but tell them that their feedback would not impact the incentives that they will receive.

We'd love to hear your experience in conducting remote qualitative research!

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