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Participatory, observation & face to face research methods

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PARTICIPATORY, OBSERVATION & FACE TO FACE RESEARCH METHODS

Guidance for Researchers

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INTRODUCTION

Due to the coronavirus pandemic, researchers around the world have had to shift to digital domains to generate data, redesign their studies, and rethink the ways in which they engage with participants.

Substituting face-to-face with digital methods presents both opportunities and challenges for researchers at all phases of the research process. For example, research participants may gain more power and agency within the researcher-researched relationship framework, and participants may be drawn from a wider geographical and social field. There may also be greater flexibility in when and where research takes place: the use of multimodal software for engaging with participants has allowed researchers to receive information from their participants at the times and in the forms convenient for them. However, researchers have not always been able to reach or create and maintain engagement with participants due to, for example, inequalities in access to digital technologies or reliable internet connections. It can be harder to access vulnerable and marginalised groups, who don't have access to or experience with devices and software, and ensuring participant confidentiality and privacy can be a more complex process. Additionally, participants with disabilities might face extra challenges using certain technologies.

This document aims to provide guidance for doctoral and early career researchers at the University of Edinburgh on remote data generation in circumstances when conducting fieldwork involving qualitative participatory methods and physical engagement is not possible. It was developed via desk-based research, case studies of existing work at the University of Edinburgh, and a workshop.

ONLINE SURVEYS AND QUESTIONNAIRES

In the place of face-to-face interviews, online surveys and questionnaires can offer researchers the flexibility to engage with participants remotely. There are different types of surveys that can be used:

- text messaging surveys using the text messaging functionality of phones, which offer flexibility for research participants to answer at their convenience
- computer-assisted phone interviews, where researchers call participants by phone and ask questions
- interactive voice responses where questions are recorded by researchers in advance and sent to the participants

The University of Edinburgh advises using two online survey tools: the **Online Surveys** tool by Jisc, and **Qualtrics**. The Online Surveys tool is the primary research tool for conducting online surveys that complies with the University's Data Protection rules and regulations: **information on using the Online Surveys** tool is available through the Jisc site. The types of surveys it can be used for include student evaluations on courses, PhD projects, and large- or small-scale qualitative research studies. Staff and students are advised not to use the Online Surveys tool to collect sensitive personal information. Qualtrics has a higher level of information security and researchers working with sensitive topics might find it more suitable. The types of surveys and questionnaires developed with Qualtrics can include employee evaluations, participant opinions and attitudes, and customer evaluations, and **information on using Qualtrics** is located on the tool's website.

Issues of privacy and consent are just as relevant to digital research methods as to face-to-face data generation, and researchers are required to adhere to best practices, which include:

- obtaining consent
- ensuring participants' anonymity
- allowing options to withdraw
- handling data securely

Prior to using any survey tool, researchers are advised to ensure that its measures for handling personal data are in line with the GDPR rules and regulations and that data is stored on servers within the UK, European Union or European Economic Area (EEA). For more details, please see the University of Edinburgh's **advice on data protection** as well as the Accessibility section of this document.

ONLINE INTERVIEWS OR FOCUS GROUPS

Existing face-to-face research methods, for example online interviews or focus group discussions, can be moved online using digital tools such as Microsoft Teams, Blackboard Collaborate or Zoom Enterprise, all of which are approved by the University of Edinburgh and have different functions (see Table 1).

It is advisable to discuss tools at the planning stage as participants may not have access to or familiarity with a specific technology, and may require adjustments be put in place to enable them to participate. The University of Edinburgh has **further guidance on conducting research online using these tools.**

	MICROSOFT TEAMS	BLACKBOARD COLLABORATE	ZOOM ENTERPRISE
University-preferred	Y	Y	N
Integrated with Office 365	Y	N	N
Screen sharing	Y	Y	Y
Meeting recording	Y	Y	Y
Breakout rooms	Y	Y	Y
Use for confidential, sensitive or personally-identifiable University information	Y	Y	N
Good for users outside of the University	Y	N	Y

Table 1. Comparison of the University-approved platforms

Using online platforms, such as video conferencing and social media, to collaborate with other researchers, attend online events or even gather research data by interviewing research participants can pose accessibility challenges. Mechanical solutions can include options to use chat functions instead of speech, recording a discussion to refer to later, transcription, dictation programs, not using video in some instances to, for example, maintain privacy, or digital hands-raising to manage group discussions for those who struggle with social cues or anxiety. Empathetical solutions might include reducing background noise or preparing scripted questions in advance. Recognising potential access issues and offering multiple options for participation can lead to the best outcome for all.

SOCIAL MEDIA RESEARCH

Social media can offer rich material for research, but it can be difficult to access some social media data, and there can be complex ethical considerations around permissions and privacy.

Social media research can include monitoring social media platforms, netnography (Costello et al) research observing online social behaviour, or engaging with or observing online communities to study attitudes of or feedback from participants.

Twitter remains one of the most-used social media networks by academic researchers, due to the accessibility of its data. The **Twitter API** (Application Programming Interface) allows researchers access to past and current tweets. While it requires knowledge of a programming language, sample code is widely available, and can be adapted to the individual researcher's needs. The recent expansion of the API to include a new **academic research product track offering access to historical data of all public tweets** requires knowledge of either Python or R. The tool **Twitter Archiving Google Sheet (TAGS)** allows for the automated collection of tweets into a spreadsheet. This tool is free and easier to set up but does not offer as extensive access. Even though Twitter data is available with varying degrees of ease of access, there are some limitations to consider before starting on this journey as Twitter users are not representative of the general public and Twitter is not used universally.

All social media research has its own ethical implications and should be carefully approached by researchers. As well as the **University of Edinburgh's guidance on data protection**, there is recently published **ethics guidance for social media research.**

TWITTER API

TWITTER FOR ACADEMIC RESEARCH

TWITTER ARCHIVING GOOGLE SHEET (TAGS)

UOE DATA PROTECTION GUIDANCE

ETHICS GUIDANCE FOR SOCIAL MEDIA RESEARCH

MOBILE PHONE DIARY METHOD

Smartphones are increasingly being used in digital research methods as their design enables researchers to generate qualitative multimodal data (García et al).

The Mobile Phone Diary Method enables researchers to generate data by gathering regular contributions from participants. The WhatsApp messaging application is a popular tool for diary methods due to its familiarity and popularity with participants. The Qualitative Report has published an **extensive list of qualitative research tools** which includes many options for projects using the mobile phone diary method.

For an example of the diary method in action, see Dr Lauren Hall-Lew's video case study of **The Lothian Diary Project**. More mobile diary method case studies are described in the following articles (full details of which can be found in the **Further Reading** section of this document):

- using the Mobile Instant Messaging Interview through WhatsApp to study the ways in which participants use digital media in their everyday lives (Kaufmann & Peil)
- using Mobile Phone Visual Ethnography to explore participants' everyday lives and mobility within marketplaces (DeBerry-Spence et al)
- using mobile phone diary to study the lives of homeless individuals (Karadzhov); developing a diary method app to study participants' everyday lives (García et al)
- in research with young children (Plowman & Stevenson)

DIGITAL METHODS RESOURCES

The coronavirus pandemic has brought researchers from all over the world together to share resources for adapting research, such as this **crowdsourced document on research methods**, and **three online books published as a rapid response to researching in the age of coronavirus.**

A good resource for those just starting their journey into digital research methods is Catherine Dawson's A-Z of Digital Research Methods, an accessible, overview of a variety of qualitative and quantitative methods, which incorporates introductory knowledge, practical applications and further research implications.

More information about digital research methods can be found through Information Services Digital Skills and Training, and the **Research Data Service** (RDS). The RDS have compiled a number of **quick guides on aspects of the digital research** process, including data management, protection and storage.

The **Centre for Data, Culture & Society** provides training and news about external training opportunities.

ETHICAL CONSIDERATIONS

With the increased use of digital research methods, some ethical dilemmas and implications have become more obvious. The issue of privacy is especially important while conducting digital research methods with participants since researchers are not in the same setting with their participants and do not have much information about their settings. Similarly, participants do not know about researchers' settings at the time of providing information about their lives, or about the privacy policies of the platforms they are using. Therefore, researchers are expected to address participants' concerns in terms of privacy issues before they conduct their research by reviewing the privacy policies and security settings of any platform that they use, and where necessary communicating these to participants.

There is guidance available on how to undertake digital research in an ethical manner. The CAHSS Research Ethics Committee have collated a frequently-updated document with extensive **guidelines on the ethical considerations of research under difficult circumstances**, the British Sociological Association (BSA) has developed **Ethics Guidelines and Collated Resources for Digital Research**, and researchers at the University of Aberdeen have compiled an accessible guide to **social media research ethics**. See also S**ocial Media Research: Ethics Guidance for Researchers.**

ETHICAL RESEARCH IN DIFFICULT CIRCUMSTANCES

ETHICS, GUIDELINES AND COLLATED RESOURCES FOR DIGITAL RESEARCH

SOCIAL MEDIA RESEARCH ETHICS (ABERDEEN)

SOCIAL MEDIA RESEARCH: ETHICS GUIDANCE

ACCESSIBILITY

Where research involves collecting data from human participants, planning for the access requirements of individuals with a disability, learning difference or health condition must be considered. While there may be additional hurdles to overcome in the use of online platforms and methods, there may also be significant advantages, due to the technical supports that can be put in place for example captioning or screen readers. The challenges and opportunities that come with remote data generation are likely to be specific to individual projects, and will require thinking about in the planning stages to determine which research practices require adaptations to meet the different needs of all researchers, participants and project partners. Such planning requires an awareness of the various access needs and solutions available and requires communication with individuals about their specific requirements. Asking someone to disclose their disability or condition requires sensitivity, flexibility and an awareness of protocols around confidentiality and disability rights.

The UK Government's Office for Disability Issues has published **advice for involving disabled people in research**, which includes guidance on inclusive research design and conducting accessible surveys and fieldwork.

CASE STUDIES

The videos below present case studies of University of Edinburgh researchers who have successfully adapted their projects using digital research methods.

Dr Lauren Hall-Lew

Dr Lauren Hall-Lew, Reader in Linguistics and English Language, introduces the team, background, methodology and aims of the Lothian Diary Project. She discusses how a pre-coronavirus strategy of predominantly face-to-face interviews was successfully substituted with audio and video self-recordings made on participants' personal portable devices, and how the descriptive information normally gathered through interviews was instead collected through surveys administered using Qualtrics (see Online Surveys and Questionnaires Section). Recruitment of participants for these research methods was challenging and required using multiple channels.

LOTHIAN DIARY PROJECT

Dr Ailsa Niven

Dr Ailsa Niven, Senior Lecturer at the Moray House School of Education and Sport, introduces a number of approaches to successfully using online questionnaires in participatory research. The video discusses the two main survey tools approved by the University, which are the Online Survey tool and Qualtrics (see Online Surveys and Questionnaires Section), and also some of the ethical considerations.

A second video delves deeper into the ethical considerations of conducting participatory research in an online environment, and points to a **frequently-updated guidance document created by the College Research Ethics Committee.**

USING ONLINE QUESTIONNAIRES

THINKING ABOUT RESEARCH ETHICS

CASE STUDIES

Dr Marlies Kustatscher

Dr Marlies Kustatscher, Lecturer in Childhood Studies at Moray House School of Education and Sport, shares reflections on a research project using participatory digital methods with young people. The video covers how the inability to conduct in-person research was overcome by using multi-modal and creative approaches, and offers tips on conducting research using these methods.

PARTICIPATORY DIGITAL METHODOLGIES WITH MARGINALISED YOUNG PEOPLE IN FRAGILE CONTEXTS

Dr Jule Hildmann

Dr Jule Hildmann, Senior Research Fellow at Moray House School of Education and Sport, shares her experience of using gamification in an online survey to address the challenge of generating responses. The respondent takes on a role of a participant in a TV quiz show. The video discusses how survey design increased engagement and retention but also surfaced challenges around issues of sensitivity and data security.

EXPERIENCE WITH THE GAMIFICATION OF AN ONLINE SURVEY

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