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Conducting Research Online



Running surveys, interviews, and focus groups using online platforms and tools

Transitioning from face-to-face to online research

Qualitative research is often conducted face-to-face in a variety of settings and formats but in the current world of social distancing, travel restrictions and limited finances, moving this research online may be an attractive but daunting prospect. Adjusting your research to be conducted virtually or online presents and provides significant challenges and opportunities.

This quick guide will give you a brief introduction to how you can meet the challenges and exploit the opportunities presented by these new ways of conducting qualitative research.

Types of research methodology

Surveys

Surveys have been conducted online for many years, and as a result little has changed. However, difficulties in reaching certain groups through online platforms remain, and care must be taken to avoid surveys being hijacked by special interest groups. It is also possible for unwitting bias to creep in, for example if links to a survey are promoted too narrowly as many people stay within a “digital bubble” or “echo chamber.”

Interviews

Video interviews may seem the obvious way to replace face-to-face interactions. However, these depend on both interviewer and interviewee having access to appropriate devices and stable internet access. It is also possible that interviewees will be less forthcoming if they do not feel they have the same privacy or safety they would have had in a neutral location. Performing the interview using audio only may reduce technical issues, but will also change the nature of connection between interviewer and interviewee. Using text-based chat is a third option, but this may mean that the interview takes much longer than would otherwise be the case, and again affects the quality of the interview.

Focus/discussion groups

Online focus/discussion groups require fast and stable internet connections in order to allow all participants to engage fully. You should consider if all members of the group will have access to the equipment necessary to participate: while a mobile phone may work fine for a one-to-one event, it is likely to work less well for group discussions. Be cautious about how events are promoted: there have been many examples of malicious individuals hijacking events, so seek to ensure that all participants register ahead of time, and if possible, confirm their identity. During the session it is important that everyone feels equally able to participate, so the moderator should take time at the outset to establish rules and etiquette and ensure that all participants know how to use the platform effectively.

Important things to consider

Information security

You should complete the Information Security training on Learn before beginning your research online. Not all tools have the same level of Information Security built in, so ideally you should use ones which make use of encryption at all stages. The promotion of events should be done carefully, and “open” events should be avoided as these may be hijacked by malicious individuals. Ensure that all devices used to record or store material from these activities are stored safely and encrypted whenever possible.

Data protection/working with sensitive data

You should complete the data protection courses on Learn before beginning any research using personal data. You need to be confident that any data collected will be processed in accordance with the Data Protection Act 2018, the UK legislation based on the GDPR regulations.

Participant information and consent

Research participants have the same rights, and researchers have the same responsibilities, irrespective of how the research is conducted. Be sure to provide information sheets about the research and receive informed consent.

(This is important from an ethical standpoint, although do note that consent should not be the basis for a GDPR Data Protection Impact Assessment: this will ordinarily be ‘public task’; for more detail, see: www.ed.ac.uk/data-protection)



Data quality

Moving online may mean you are reaching different participant pools than others, e.g. groups which lack fast and reliable internet access may be disenfranchised. It may also be more difficult to build rapport with participants, leading them to respond differently in an online setting than they would face to face. These potential issues mean that care should be taken when comparing data from real life and virtual interactions.

Recruiting participants

Some audiences will be easier to reach online – and others harder – owing to a range of factors, e.g. level of engagement with social media, access to technology, reduced access to alternative formats or translators, or reluctance to venture outdoors due to pandemic fears. It is important to consider carefully how the choice of platform and methodology may impact on the engagement of different cohorts.

University supported platforms

Microsoft Teams

Teams is the University's preferred platform for online interactions both within and beyond the University community. Teams is fully integrated with Office 365, allowing easy sharing and editing of Office documents. It is suitable for one-to-one's, small and medium sized meetings (of up to 250 participants), and collaborative writing of documents. All chats and meetings can be recorded and downloaded for future analysis.

www.ed.ac.uk/information-services/computing/comms-and-collab/office365/teams

Blackboard Collaborate

Collaborate is primarily used for teaching and learning, but may be also useful for some types of research where it is important for participants to share documents with other members of a group. Collaborate is good for large, more formal meetings that you want to record for future reuse. Breakout rooms can be created to allow multiple discussions to take place simultaneously, however, Collaborate may be of more limited use with people outside the university due to access/rights restrictions.

www.ed.ac.uk/information-services/learning-technology/communication



Zoom Enterprise

Zoom has been procured as an alternative to MS Teams, but comes with some warnings; in particular it should not be used for “confidential, sensitive or personally-identifiable University information.” Zoom is widely used and therefore a good option for collaboration with people outside UoE, provided proper information security is applied. It can support meetings of up to 300 people, and meetings can be recorded by the host.

<https://www.ed.ac.uk/information-services/computing/comms-and-collab/zoom>

Skype for Business

Skype is being retired in July 2021 and will no longer be supported after this date. Skype can be used to make calls from your computer to a phone number, which may be useful if participants are more comfortable with a traditional phone call. It can also be used to host one-to-one conversations or smaller meetings which can be recorded.

www.ed.ac.uk/information-services/computing/comms-and-collab/office365/skype-for-business

Online Surveys

Formerly known as Bristol Online Surveys, this is the University’s primary research survey tool. It is available to all staff, and to research students with approval from their supervisor. This tool is generally Data Protection compliant, but users should always practice good information security and refrain from collecting personal data which is not essential to the research. All users should familiarise themselves with the available guidance before creating a survey.

www.ed.ac.uk/information-services/learning-technology/survey-tools/online-surveys

Qualtrics

Qualtrics is supported by Information Services for use by CAHSS research staff and students. It has a wider range of survey and question types than Online Surveys, and has a higher level of information security. As such it is the preferred platform for research collecting sensitive data in this College.

www.ed.ac.uk/information-services/learning-technology/survey-tools/qualtrics-for-cahss-members



If you need to use an unsupported platform

There are various reasons why none of the above tools may be a perfect fit for your research, including but not limited to; collaborator or funder requirements, participant access to technology, and technical shortcomings. In such cases you should follow the following steps to ensure the highest information security and data protection standards are maintained.

1. Contact Information Security for their advice and recommendations;
2. Contact the Data Protection Office and complete an appropriate DPIA, ensuring that all potential risks arising from using the tool are evaluated and that necessary risk mitigation steps are taken;
3. Complete a Data Management Plan, ensuring that the plan includes the practical steps that will be required to secure, and quality assure the data;
4. Clearly document why particular unsupported tool(s) have been chosen instead of supported ones and be prepared to justify the decision to the University, funders, collaborators and possibly the Information Commissioner if necessary. Be clear about the advice you have received from Information Security and the Data Protection Office, and if and how you will implement it. If you are going against the advice given you must be prepared to accept the potential risks!

Contacts and resources

- Research Data Service website: www.ed.ac.uk/is/research-data-service
- Data Protection website: www.ed.ac.uk/data-protection
- Data protection and social media: www.ed.ac.uk/data-protection/data-protection-guidance/data-protection-social-media
- Third party software applications and services: www.ed.ac.uk/data-protection/data-protection-guidance/specialised-guidance/software-application-services
- Information Security homepage: www.ed.ac.uk/infosec
- Online and Digital Events Service: www.ed.ac.uk/information-services/computing/comms-and-collab/online-meetings-and-events
- Security and privacy guidelines for using Zoom: www.ed.ac.uk/information-services/computing/comms-and-collab/zoom#uoe_featurebox_ec5b73f894731c9c9fcd0c34142bceb78
- Contact Research Data Support by email: data-support@ed.ac.uk or contact the IS Helpline: is.helpline@ed.ac.uk

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