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QUALITATIVE REMOTE DATA COLLECTION GUIDANCE 2024

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Executive Summary

In 2020, the sudden onset of the COVID-19 pandemic forced qualitative health and social care researchers to rapidly convert to remote methods of data collection (i.e. methods of collecting research data when the researcher and participant are not together in the same space). In a post-COVID-19 research landscape, use of remote qualitative methods is now a choice, not a necessity.

This guidance was developed to support researchers who are making decisions between the use of remote or face-to-face methods.

Methods

The guidance was developed by a team of experienced health and social care researchers through two literature reviews (a scoping review and a realist review), interviews with 25 researchers and research participants and a consensus conference (attended by 27 research stakeholders) where the guidance was ratified. A diverse public reference group (PRG) with eight members informed all stages of the research process and guidance production.

Key Points

- Remote qualitative methods can increase access to research spaces for diverse groups of participants, making qualitative research more inclusive. However, lack of trust and access to both technologies and digital skills continue to pose significant barriers to remote participation. Therefore, **choice of method/s and technologies need to be guided primarily by participant needs, technology access, skills and preferences**. This might include not using remote methods at all, or offering a range of methods including both remote and face-to-face methods.

- Technologies and platforms that can be used for remote data collection produce very different types of data (visual, audio, text or all three) and can be implemented synchronously, asynchronously or near synchronously. **Participant and researcher comfort with the technology (familiarity and skills) are pivotal to achieving high quality data**. However, there may be a mismatch between participants' preferred technologies and those that are supported by funding bodies, research institutions and ethics committees. **Participant preferences should be prioritised wherever possible**. Where this is not possible, clear explanations should be given to participants as to why their preferred platform is deemed unsuitable for research purposes. **Where participation is contingent on use of a particular technology** (e.g. due to access needs, cultural norms, safety or privacy risks), **this should take precedence as an integral part of inclusive research practices**.

- **Preparing participants for both data collection and for technology use is critical**. This early contact can support rapport building, strengthen the robustness of consent processes and reduce technological challenges during data collection itself.

- Whilst faster to set up and requiring fewer practical resources (finances, travel, time, space), remote methods of qualitative data collection can be as demanding, or even more demanding, than face-to-face methods for both researchers and participants. This research burden can be obscured by the technologies, and as such can be unforeseen by researchers and research participants alike. **Researchers should consider cognitive/emotional burden, fatigue and support needs on both sides of the research exchange when designing remote methods**. Some participants and researchers will be more vulnerable to the harmful impacts of remote methods than others.

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- Power dynamics operate differently in the context of remote methods than in face-to-face data collection. Participants have greater control to choose the conditions of their contact with the researcher, with swifter exit routes and more autonomy to curate what is seen (and not seen) by the researcher and/or other research participants. **Researchers should support participants to harness this control in ways that empower them to shape the research encounter to meet their needs, whilst simultaneously ensuring that their privacy, safety and anonymity are protected, and any threats to them anticipated and highlighted**.

- There are increased opportunities for participant anonymity and identity concealment in remote data collection contexts when compared to face-to-face. However, there can also be additional risks to privacy, confidentiality and safety. **Researchers need to support participants to identify and manage these opportunities and risks, whilst also managing their own, particularly as these relate to the chosen technology and the physical environment in which the technology is used**. Certain participant groups are more vulnerable to privacy and safety risks than others and this should be considered at the outset.

- Ending remote data collection encounter/s can be very different to those conducted face-to-face, particularly for asynchronous data collection. **Researchers need to plan for exiting the remote field in advance of beginning data collection. They also need to be clear on how this will be signalled to participants, to draw boundaries around what 'counts' as data and what does not as these lines can be more blurred in remote data collection than face-to-face.**

- Identifying, and responding to, psychological distress can be more challenging when qualitative data is collected remotely. Lack of visual or audio cues and/or long periods of silence between responses can compound these difficulties. Researcher role boundaries may also be harder to maintain when research relationships extend over long periods of time, are conducted outside of usual working hours, or enter into the researcher's home/personal environment. **Safeguarding and psychological distress protocols should be designed specifically for remote contexts as those designed for face-to-face data collection will not 'carry over' seamlessly to remote contexts.**

Conclusions

The literature broadly demonstrates the equivalence of remotely collected qualitative data vis-à-vis face-to-face, both in terms of data quality and data depth (Boardman et al, 2022). Additionally, the use of remote methods can make qualitative research less resource intensive, with reduced environmental harms (travel). It can also be more convenient for participants and researchers alike and can facilitate access to more diverse groups of geographically dispersed participants, increasing diversity and inclusivity in health and social care research.

Care must be taken, however, to ensure that remote methods are not exclusionary and to explore, before data collection commences, which voices may be silenced by their use. Identifying participants' needs, typical communication channels, abilities and technology access in ways that take account of their socioeconomic and cultural backgrounds and local contexts are pivotal to this endeavour. Researchers should support participants to harness the autonomy that remote methods can bring, so that they may directly shape the research encounter/s to suit their circumstances and needs. However, it is important to note that this might include the decision to defer entirely to face-to-face methods, or to offer face-to-face as an adjunct method within a hybrid remote/face-to-face design.

Section 1: What is the QRDC guidance, and how was it developed?

The QRDC guidance is an evidence-based tool that qualitative researchers considering whether, and how, to include remote data collection in their qualitative research designs can draw on to support their decision-making.

It has been developed using realist reviewing, empirical data collection and deliberative techniques with experts (including experts by experience) to arrive at a consensus on its final points of guidance. It draws on existing evidence that demonstrates which remote methods work well, in which contexts, and why. It also pulls in wider evidence where the mechanisms of what works well, and why, are still emerging to highlight factors that researchers may need to consider in remote qualitative research designs.

Why was the QRDC guidance developed?

In 2020, the sudden onset of the COVID-19 pandemic forced health and social care researchers to rapidly convert to remote methods of data collection (i.e. methods of collecting research data when the researcher and participant are not together in the same space).

For those conducting qualitative research, where context and rich communication are critical, this abrupt conversion was particularly significant. A body of work exploring the impact of remote methods on the quality of qualitative data pre-dates the pandemic. However, this literature had never been systematically appraised and synthesised to form an evidence base, which contributed to concerns about data quality amongst qualitative researchers as they were forced to adopt remote methods in 2020.

As pandemic conditions endured, qualitative researchers produced a new wave of remote qualitative publications, using a range of methodologies and technologies in a variety of health and social care research areas, and beyond. These publications often included reflective papers on the qualitative research process when remote methods are used. Now that we find ourselves in a new context, researchers across the world must make active decisions about when and how to use remote and in-person methods of data collection.

The QRDC (Qualitative Remote Data Collection) study was conceived in response to a call for research that explores the quality of remote qualitative data as part of the 'Better Methods, Better Research' scheme, supported by the Medical Research Council (MRC) and the National Institute of Health Research (NIHR) [grant reference: MR/W021161/1]. Undertaken between July 2022 and July 2024, the study was designed to harness the experiences and expertise of both past research participants and researchers to produce guidance to support high quality, and inclusive, health and social care research. The guidance provides input on the type of remote data collection methods that are most appropriate across the broad spectrum of qualitative methods, technological mediums, topics, social contexts and population groups within the field of health and social care research.

Definition of remote for qualitative data collection

Our working definition of 'remote' in the context of qualitative data collection was developed with our public reference group (PRG):

"Technologically-mediated and interactive methods of qualitative data collection where the researcher is physically removed from encounter/s with participants, and where there is a face-to-face equivalent method"

Our efforts were geared towards supporting researchers to make decisions between face-to-face and remote options. We therefore excluded already well-developed remote qualitative methods, such as diary methods or auto-ethnography although these may include remote communication technologies (e.g. audio diaries) (Mupambireyi & Bernays, 2019). Using this definition, qualitative data collection methods are included where the researcher prompts participants to share verbal, visual or written data whilst being physically absent from their environment. Extant or 'naturally occurring' data collection methods

(Mare, 2017; Hensen et al, 2021), for example, gathering unprompted data from websites, social media posts, chatrooms, forums etc. which were posted for reasons other than research participation and without researcher influence, were excluded due to their lack of face-to-face equivalents.

Remote data collection methods using our definition occur in various ways:

- Synchronous audio, audio-visual, reaction emojis, captions and text exchange, or a combination of audio/audio-visual and text
- Asynchronous exchange of text, audio, visual, or a combination. The time between each exchange can vary (hours/days/weeks/months).

Asynchronous data collection is often undertaken over a longer time period than synchronous data collection such as an interview or focus group. We distinguish this from longitudinal data collection as follows:

- Collecting data asynchronously over time has the aim of enriching the data for deeper understanding.
- Longitudinal data collection has the aim of identifying and exploring change.

Methods

Public involvement

Public contributors have a valuable role to play in methodological research (Burke et al, 2023). Although researchers are the primary audience for the guidance, the perspective of (potential) research participants were important throughout the project. We recruited eight members of the public to the PRG, mindful of the need for a range of perspectives. Members represented a range of ethnicities, genders, ages, disabilities, caring experiences, neurodiversity, and different experiences of contributing to research. We also recruited participants for their diversity of views on use of remote or face-to-face methods. The breadth of these views was particularly important in maintaining lively and critical engagement with the research topic. Meetings were structured around key steps in the project: an introductory overview, scoping review findings, study design for interviews, realist review findings, draft guidance and dissemination plans.

Scoping review

We conducted a scoping review (Aromataris & Munn, 2020) to map the available evidence comparing in-person and remotely collected qualitative data. Full details of the method can be found in the scoping review protocol (Boardman et al, 2022).

The review identified 58 articles that compared in-person and remotely collected data within one study, published between 2001-2024. The review found that remotely collected data is often shorter (measured by duration or word count) but analysis generates similar topics and themes. Non-verbal data, such as body language and contextual cues, is less available remotely and focus group participants may interact less, potentially resulting in less depth of data. For sensitive topics, the relative anonymity and distance created by remote methods may facilitate rich data, although within some communities there may be distrust of the confidentiality of online communication. We argue that the implications of remote data collection for data quality and inclusion are likely to depend on an interaction of research question, participant groups and epistemology. Further research is needed to extend understanding of how these factors interact. The scoping review will be published separately. Papers included in the scoping review were carried forward to the realist review.

Realist review

Building on the findings of the scoping review, a realist review (Pawson et al., 2005) was conducted to iteratively identify the mechanisms and context in which high quality remote qualitative data collection occurs. This involved identifying programme theories on what works for whom, where, when and why (context + mechanism > outcome, hereafter CMOs) and testing these theories against published evidence and expert opinion (Wong, 2015; Pawson et al., 2005). The realist review drew on papers identified in the scoping review, interviews with researchers and research participants and the wider literature to develop the CMOs.

We interviewed 17 qualitative researchers and 10 research participants with experience of qualitative research about health and social care between 31st May 2023 and 16th April 2024. All interviews were conducted remotely. Interviews explored what worked well remotely and what was more challenging and asked participants to reflect on emerging programme theories. CMOs in the data were coded. Participants were also asked about what they would like to see in the guidance being produced by the QRDC study. We brought together our CMOs from the literature, interviews and discussions with the PRG and grouped them into themes.

For each theme, a member of the research team read the relevant CMOs and the source data (literature, interviews, PRG discussion) and then conducted a search for related literature to confirm or refute each CMO and to develop the CMO into guidance statements to support decision-making in the research design process. Where we identified gaps, either through work with our PRG, or using our knowledge and experience as qualitative researchers, we looked for published evidence to support recommendations to fill the gap.

To further test these CMO based guidance statements, we held the QRDC consensus conference on 30th January 2024. Attendees comprised a diverse group of 52 researchers, research participants, community research engagement group representatives, funders, and our public reference group. Working in small groups, and with two plenary sessions, we reviewed and refined our CMO based recommendations with their supporting evidence. We noted participant reflections, new CMOs and additional evidence and used these notes to refine the CMO based guidance statements.

Finally, the statements were grouped and mapped chronologically to the research process. This provided the structure of the sections for the guidance.

Further detail of the research method will be published separately.

How to use this guidance

The QRDC guidance was developed to support researchers to make design decisions regarding the use of remote data collection methods in qualitative research. It is organised into sections that map across the research process. To ensure readers can refer back to the guidance in an ad hoc manner, as well as read it as a full document, themed recommendations can appear in multiple sections. Links have been inserted to help you trace themes across sections.

The QRDC guidance was written assuming that the reader has a research question and/or a theoretical approach in mind and a commitment to using qualitative or mixed methodologies. The guidance can guide decisions about different combinations of methods and technologies according to participant group, within the broader research design.

Points to bear in mind

When working with the QRDC guidance, please bear in mind the following points which have determined the scope and remit of this guidance:

1) It is important to remember that the QRDC **guidance is focused on remote qualitative data collection alone**. This means that other aspects of the research process (e.g. analysis, dissemination) are beyond its scope. However, they are considered where the remote nature of data collection directly impacts them. For example, the use of text-based interviews introduces new forms of data to be analysed (e.g. emojis); or, undertaking concurrent text-based interviews may obstruct the cross-pollination of interviews typically used in grounded theory approaches.

2) **This guidance sits within an extensive and rich qualitative methods literature**. Research considerations that pertain to all qualitative data collection are excluded from this guidance, in order to focus specifically on those unique to remote. For example, whether transcripts should be returned to participants for checking and approval is a consideration for all qualitative researchers and so falls beyond the remit of this guidance.

3) This guidance has been designed to support researchers to critically appraise remote communication technologies, with qualitative data collection and their participant populations in mind. As such, these recommendations pertain to all current and nascent communication technologies that could be used for qualitative research. Various digital communication technologies are referenced in the guidance but as illustrative examples only. The guidance is not designed to direct researchers to specific

technologies, nor to endorse them. These technologies and their 'research relevant' features will continue to evolve and change rapidly over time, however the underlying principles outlined in the guidance remain the same.

4) The QRDC guidance has been written with a UK research audience in mind. It is assumed that the researcher is working within a UK research infrastructure, although it includes literature and examples drawn from across the globe. We recognise that the infrastructure available to support remote data collection varies globally, and this needs to be considered when using the guidance to inform research design decisions. Despite this, it is likely that the QRDC guidance will have transference to non-UK contexts.

5) The QRDC guidance was developed using diverse sources of evidence. These include the extant published and grey literature, the contributions of our PRG, empirical data derived from interviews (with qualitative researchers and participants), and the findings of our consensus conference, which brought together a wide range of research stakeholders. MORE INFORMATION These data sources are cited throughout. Where a CMO came from our consensus conference, this is cited in-text as (source: consensus conference).

6) It is also recognised that some research designs will use remote qualitative methods in combination with face-to-face qualitative methods, and that in some instances, the line between face-to-face and remote methods can be somewhat blurred (e.g. 'in-person WhatsApp focus groups' Singer et al. (2023)). Combinations of remote and face-to-face data collection methods, or hybrid designs, are considered in the guidance, but with a focus on the implications for the remote aspects of the data collection.

Getting Started

While researchers may wish to read the guidance in full, it has been organised in such a way that it is possible to 'dip into' individual sections to assist with particular decisions or scenarios. Worked examples demonstrating how the guidance can be used to inform these decisions are included in appendix 4. These include a researcher designing a remote qualitative study on disability and social care, a remote qualitative study on shared decision-making in maternity care and a researcher's reflections on their decisions regarding use of remote qualitative methods and fieldnotes in their study of health management in a resource constrained setting. MORE INFORMATION

To support ease of use of the guidance, each section contains a summary which draws out key themes covered. It also contains a list of 'researcher prompts'. These prompts are questions to guide research teams as they think through the translation of the guidance to their specific study. Whilst directed towards researchers, the section summaries and researcher prompts would benefit from input from public contributor groups at each stage of the research process to support the co-development of a research design that meets the needs and preferences of the participant population under study.

Researcher Prompts

To begin using the guidance for a study, firstly consider:

1. **Is it important for your study to have group interaction between research participants OR individuals (potentially with a supporter) who interact with the researcher, OR a combination of these approaches?**
2. **Is the population of interest, or some members of it, under-served, hidden, stigmatised or otherwise marginalised in any way? If so, why/how?**
3. **Is the topic sensitive or not? If sensitive, in what way, and why? If not, does it have the potential to be sensitive for some participants?**
4. **Are there any particular advantages or disadvantages of different data formats (text, audio, visual or a combination of these) for your analysis approach?**

For each consideration, keep the research question at the forefront of your mind. Your answers to the four considerations listed above will support your learning as you work through the guidance.

Section 2: Designing Remote Qualitative Studies: Participant Populations

When considering the use of remote methods, which participant groups you want to access, the avenues through which you will recruit them (whether remote or face-to-face) and strategies to support inclusivity need to be considered at the outset. Indeed, the speed and relative ease of remote methods can mean that researchers are at risk of overlooking the individual characteristics of their participants who will invariably be impacted by the research encounter in differing ways (Engward et al., 2022).

Participant Populations

Remote methods can facilitate greater geographic, cultural and socioeconomic diversity by opening up a larger 'pool' of potential participants including those who would have been unreachable face-to-face (Wilkerson et al., 2014, Keen et al., 2022, Lathen and Laestadius, 2021) and those who are 'location bound' (Fritz & Vandermause, 2018), such as carers, people with certain health conditions, people in conflict, or pandemic-affected settings. Remote methods can also make research more accessible to researchers with disabilities or health conditions, as well as those who have caring responsibilities at home or for whom travel is a barrier. Supporting diversity amongst researchers as well as participants is important to the overarching goal of inclusive research (Brown and Boardman, 2011).

However, it is important that remote research is not positioned as the answer to constraints on the research (e.g. access to participants, finances, time). The research question should be the guide for the sampling and recruitment, rather than the available technology, and researchers should resist the temptation to have a very wide sampling frame if this does not fit with the research design.

Below, we offer some insights around specific participant groups, drawing on available evidence. The list is not exhaustive but suggestive of how the needs of specific groups can be considered. Moreover, the groups are also not mutually exclusive, and the influence of intersectionality and how this can be integrated into research design are presented.

People with Disabilities, Health Conditions and Those with Caring Responsibilities

Remote methods facilitate the inclusion of people (both participants and researchers) with disabilities and health conditions that would otherwise preclude their participation. This may include participants and researchers who identify as neurodivergent (Oliffe et al., 2021), have mental health difficulties, those living with fatigue or pain, those who have caring responsibilities (Henderson & Moreau, 2020), mobility challenges or those with clinical vulnerabilities, e.g. people with cystic fibrosis who are advised not to have close contact with others with the same condition (Sy et al., 2020, Oliffe et al., 2021, Nicholas et al., 2010). Indeed, for research involving people with rare conditions, who are small in number and geographically dispersed, the use of remote methods can significantly reduce travel for both participants and researchers. It is important to consider, however, that whilst remote data collection may meet the needs of certain groups of people with particular disabilities or health conditions remote methods may, simultaneously, exclude those with other types of impairment (Wilkerson et al., 2014). For example, using video-conferencing platforms without cameras on may heighten difficulties for those with communication impairments, e.g. those who rely on lip reading (Saarijärvi and Bratt, 2021, Enoch et al., 2023), but be preferable for some people who are neurodivergent as it removes an additional, potentially distracting, flow of information. If focus groups are to be included in the research design, this possibility of conflict between participants' needs should be carefully considered and may necessitate a change of technology/method or the introduction of a face-to-face method. Indeed, some of the challenges faced by people living with specific types of health condition or disability simply cannot be overcome by technology (Carter et al., 2021), and in these scenarios, face-to-face methods are a necessity. For example, as noted by Xia Ang et al. (2022), d/Deaf participants' needs are not well met by video-conferencing platforms, particularly those who use sign language, as the spatial and directional aspects of the language is lost within its two-dimensional images.

In addition, disabled people are more likely to experience technology deprivation. People with learning differences or disabilities have been digitally marginalised and excluded from research. Additional work may need to be undertaken to appropriately engage this group e.g. support with the technology, providing funding for a trusted support worker, ensuring the research is on the participant's preferred platform rather than the researcher's organisation's preferred platform (security of data may have to be weighed against the greater inclusivity of choosing an accessible platform) as well as through the provision of appropriate adaptations of the study information, such as large text, easy read information leaflets using images and symbols (e.g. photo-symbols) and videos where appropriate (source: interview with researcher; Gómez-Carrillo de Castro et al, 2023).

People in Low-Resource Settings and Remote/Rural Locations

Conducting remote research in developing countries, in remote/rural locations and with potentially vulnerable participants e.g. indigenous populations (Gratton & O'Donnell, 2011) poses several barriers. Technologies such as mobile phones are not always available or may be shared with others, and levels of digital literacy may vary widely (Cook, 2012). Participants in rural settings may have slower internet speeds, or no internet at all (Afrobarometer, 2022) as well as poor network coverage which can stilt the data collection (Pocock et al., 2021, Sevelius et al., 2020, Lathen and Laestadius, 2021, Rahman et al., 2021; Singer et al., 2023; Hensen et al., 2021). Some people may have to pay to borrow, and charge, a phone as electricity is not always available in villages or informal urban settlements, and the technologies that are available may not be in full working order. However, Reñosa et al. (2021), found that despite these limitations, they were able to recruit participants living in remote areas of Uganda and India, and the snowball sampling of those with mobile phone access facilitated inclusion. Cultural, religious and linguistic factors may also preclude participants speaking to a researcher remotely, so alternative methods of both data collection and recruitment will need to be considered in these scenarios (Nyemba-Mudenda & Chigona, 2017). In addition, people living in remote and rural locations are more likely to belong to tight-knit communities which can pose threats to both their anonymity and privacy, as well as potentially exposing them to stigmatisation or ostracization (Epp et al., 2022).

People in Conflict/Crisis Affected, Politically Oppressed and/or Insecure Locations

Remote research in conflict/crisis affected or insecure locations can circumvent risks to both researchers and participants and enables diversity of perspectives to be included in the research. It also affords the participant anonymity that would not be possible if data collection was conducted face-to-face. This anonymity can be particularly important in contexts of political oppression and where the research focuses on 'restricted topics' (Fardousi et al., 2019:11). However, there are a range of considerations to ensure research with conflict/crisis affected or insecure populations is not 'extractive' or exposes participants to additional risks (Douedari et al., 2021; Humphries et al., 2022); these include developing trust, having a nuanced understanding, and sensitivity to, the politics of the local context as well as a good understanding of the technological resources (internet connection, devices, software) available to potential participants. Indeed, platforms that are often used for remote qualitative research, such as Zoom, are currently restricted in certain countries or regions (Syria, Ukraine, Cuba, Iran and North Korea) due to them appearing in the US 'sanctioned countries' list. Data security is of paramount importance for this population, and it is important to consider whether research data, even if encrypted, are exempt from government surveillance (Endeley, 2018) and whether they can be passed over national borders (Marlowe and Allen, 2022). The emotional impacts of research with participants who are in high risk and/or distressing environments - while the researcher is not - have been highlighted in the literature, particularly in terms of researcher guilt (Humphries et al., 2022), and strategies to manage psychological distress on both sides of the research exchange need to be considered within the research design.

MORE INFORMATION

(The term d/Deaf is an inclusive term used to describe both people who are deaf but who do not identify with Deaf culture, as well as those who do)

Professional Groups

Engaging busy professional groups can be a challenge for all qualitative researchers, whether using face-to-face or remote methods (Singh et al., 2022; Vindrola-Padros et al., 2020). Remote qualitative research methods can offer advantages over face-to-face methods due to their flexibility. Humphries et al. (2022), in their remote ethnography of health care professionals' experiences during the COVID-19 pandemic, found that doctors were able to respond to WhatsApp questions when they had time, increasing the inclusivity of the research, although, it could result in one-word answers (Humphries et al., 2022). Professional groups are more likely to be familiar with remote methods of communication, however, they may need to engage outside of typical working hours which can present challenges for researchers who wish to contain the research (Humphries et al., 2022). MORE INFORMATION
Remote methods can also extend the geographical reach of qualitative methods, which can facilitate the inclusion of highly specialised professional groups who might be geographically dispersed, and for studies involving international comparisons. Retention can be challenging in remote qualitative studies, particularly asynchronous text-based methods which often take place over extended time frames. For busy professional groups, the time commitment of asynchronous remote methods can result in high attrition rates, particularly those who are already at higher risk of 'burn out' (Humphries et al., 2022).

Underserved Populations

It is important that research does not reproduce pre-existing inequalities in research and society by excluding already underserved populations (Mikulak et al., 2022). Indeed, remote methods can be used positively to facilitate the inclusion of underserved populations by, for example, removing travel costs for participants (Lathen and Laestadius, 2021) and where trust is an issue, as the researcher may be less threatening when physically removed (Adler and Zarchin, 2002; Fox et al., 2007).

However, despite this capacity for inclusivity, researchers have emphasised that distrust can often remain, with underserved communities more likely to feel unsafe sharing information about themselves remotely, particularly around sensitive issues such as immigration status (Parkin et al., 2021; Barbosa and Milan, 2019). For economically, socially and digitally disadvantaged groups, privacy concerns are one of the major reasons for not using the internet generally and translate to greater reluctance to engage in video-conferencing (Boland et al., 2022a). Remote methods can also be seen as more 'formal' especially if the invitation to participate in the research comes through the NHS (National Health Service) or another well recognised public body (source: consensus conference). These factors can result in 'digital disengagement', which refers to lack, or only very limited, use of the digital world due to personal or motivational factors, for example, around trust or confidence (Romanowski & Lally, 2024). It is closely aligned with digital exclusion and digital poverty, where there are barriers to participation in the digital world, for example, a lack of technologies or skills, or accessibility barriers (Allmann, 2022).

Having face-to-face contact with the researcher/s during recruitment can assist members of underserved communities in their decisions about whether to participate in remote research - they can question the researcher directly and assess whether they feel they can be trusted (Lathen & Laestadius, 2021). Participants are less responsive when researchers 'parachute' in and out (Tarrant et al., 2023; Archer-Kuhn et al., 2022; Douedari et al., 2021; Lathen & Laestadius, 2021). Investing time and energy into face-to-face recruitment in community spaces used by underserved populations may also be considered a signifier of respect and sincerity of intention, but this investment in relationship building can be at odds with the institutional and funder demands of research, which can focus more on rapid data collection and outputs (Dahya et al., 2023) and limit geographical range of research. In the absence of this face-to-face contact with the researcher prior to remote research, trusted gatekeepers (e.g. community/advocacy groups) can have an important role to play in facilitating relationship-building and also providing information on the best ways to engage different groups.

It is important to consider that language barriers can be amplified by remote research, which can make non-English speakers and those for whom English is an additional language (disproportionately immigrant and refuge-seeking populations), less likely to engage or be recruited into studies in the first place. Telephone interviews in particular, due to lack of visual cues, can make understanding unfamiliar accents or dialects harder (Parkin et al., 2021; Ward et al., 2015). However, use of remote methods can facilitate the employment of an interpreter, or another researcher fluent in the language spoken by the participant, without needing to factor in travel and locations, which can make identification of convenient times for participant, researcher and interpreter easier (Englund et al., 2022).

Underserved populations are more likely to live in digital poverty which means they may not have email addresses for study documentation to be sent to, they may not have access to apps (such as WhatsApp) for instant messaging, they may not have exclusive use of a smart phone or computer, or have to rely on non-secure publicly available Wi-Fi, which affects their privacy (Stone et al., 2020), but also any technology they use may not be up-to-date enough to download any apps required by the research (Strong et al., 2020). Indeed, in 2024, Ofcom estimates that 6% (1.7 million) of UK households do not have internet access at home (Ofcom, 2024). This lack of access can result in a skills deficit which is a significant barrier to participation (Lobe et al., 2020) and may only serve to reinforce distrust and scepticism regarding the value, relevance and trustworthiness of the research. Given this range of barriers, it has been suggested that for studies where incentives are offered for research participation (e.g. gift vouchers), greater incentives should be offered to research participants from lower socioeconomic groups as compared to higher socioeconomic groups, on the basis that additional effort is required, and there are larger obstacles to participation (source: consensus conference; Nicolaas et al., 2019). Moreover, any incentive offered needs to be relevant, accessible and also not affect any welfare benefits (NIHR 2024).

‘Hidden’ Populations

Remote methods can support the inclusion of people who belong to ‘hidden populations’, for example, people with stigmatised, marginalised or criminal identities. Examples of hidden populations where remote data collection has been done include: men who have sex with men (Neville et al., 2016; Hammond, 2018), young drug users (Barratt, 2012), people with sexually transmitted infections (Cook, 2012), people who identify as transgender (Cipolletta et al., 2017), indigenous communities (Gratton and O’Donnell, 2011; Chávez et al., 2024; Phillipson-Puna et al, 2024), parents who have experienced intimate partner violence (Alderson et al., 2022; Woodyatt et al., 2016) and ‘rough sleepers’ or those of no fixed abode (Parkin et al., 2021). The increased capacity for complete anonymity associated with remote methods vis-à-vis face-to-face methods can make research participation less threatening to these groups (Wilkerson et al., 2014; Matthews and Cramer, 2008; Heath et al., 2018). Furthermore, the unbounded geographical reach of remote methods can support the inclusion of populations not anchored to particular locations, for example homeless, displaced or traveller populations. However, group data collection methods with these participant groups may also bring up the possibility of them being identifiable to others who belong to the same population. This needs to be made clear to prospective participants from the outset

Children and Young People

Young people face barriers in attending face-to-face data collection, these can include lack of access to travel, constraints on independent decision-making, privacy concerns and an unwillingness to speak to an unknown adult, particularly if the research is on a sensitive topic. Remote methods can overcome many of these barriers to participation (Gibson, 2020), MORE INFORMATION However, recent research suggests that 45% of households with children in the UK are digitally excluded, meaning they lack access to technologies and skills (e.g. setting up email addresses and accounts) to participate in ‘digital society’ (Skopeliti, 2024). Despite this, as ‘digital natives’, it has also been reported that young people are better equipped than previous generations to protect their privacy in remote settings as they have greater familiarity with technology (Bolin et al., 2023) and are often more confident in their digital skills (Halliwell and Wilkinson, 2021). The type of technology used needs consideration in terms of the preferences of young people and this is likely to change over time and by geographical location. Access to different social media platforms that can be used for research (e.g. Facebook Messenger, WhatsApp, TikTok, Wink) have minimum age requirements (usually 13+) that can differ by country. Similarly, video-conferencing platforms (e.g. Zoom) have minimum ages for the establishment of an account (16+). Privacy and confidentiality may remain concerns when access to, and use of, devices are monitored by parents or school (source: consensus conference). Despite these restrictions, the inclusion of asynchronous and remote creative methodologies (e.g. using stop start animation, drawings, photographs, emojis) can help engagement, build rapport and place children's perspectives at the centre of the research (Lomax et al., 2022; Fane et al., 2016), and researchers should explore existing resources used to engage these groups (e.g. GenerationR), as well as the full range of social media platforms and means of communication that children and young people use, which may change more rapidly than for other groups.

Older Adults

Older age is the strongest predictor of being a non-user of the internet, with lack of skills and fears about privacy being amongst the key reasons (Stone et al., 2020). With this in mind, it is often assumed that older adults cannot engage effectively with remote methods and that they have persistent difficulties accessing the digital world (Bolin et al., 2023). Recruiting through social media for remote qualitative studies, for example, has led to older adults being under-represented as social media users are younger (and have higher educational status than non-users) (Mellon and Prosser, 2017). These differentials in technology have been linked to differences in access to technologies and connectivity, support, digital skills, as well as challenges around cognition, physical dexterity and vision when compared to other social groups (Hewitt et al., 2019; Huxhold et al., 2020). However, there is evidence that when tailored to their needs, remote methods can be an effective method of data collection with this group (Melis et al., 2021; Vergouw et al., 2020), and that remote methods may be preferred over travel or hosting a researcher in one's home (Teo et al., 2019).

Familiarity with the platform has been found to have more of an influence on acceptance of remote methods than the age of participant (Sedgwick and Spiers, 2009). This is supported by research that suggests that, post-pandemic, older adults are continuing to use technologies to communicate with family and undertake consultations with GPs (Boland et al., 2022b). There is also evidence that older adults engage with communication technologies in ways similar to other social groups, e.g. use of emojis (Fritz and Vandermause, 2018). Use of remote methods, however, does risk excluding, or creating additional burdens for, participants who do not feel competent with any given technology (Carter et al., 2021b; Harvey et al., 2023). Conducting a pre-data collection briefing can help participants understand what to expect and ensure they are comfortable using any required technologies and platforms (Carter et al., 2021b). Remaining flexible about the choice of technologies and allowing participants to select one that suits their needs and competencies can support inclusivity (Enoch et al., 2023; Harvey et al., 2023).

Gender

While there is some evidence that a gender divide exists in relation to access, and use, of mobile phones and other communication technologies, particularly in developing countries (Manji et al., 2021), there is also evidence suggesting that appropriate use of remote methods can support greater gender inclusivity. Examples in the literature include where men have been found to talk more freely in remote settings than face-to-face and so are more likely to participate in research where this is an option (Tarrant et al., 2023; Oliffe et al., 2021). Transgender participants may also find that non-visual remote data collection can remove the body (which is often experienced as a site of public surveillance and personal and political tensions) from the research encounter, whilst remote data collection with video can facilitate particular presentations of the body and identity (e.g. through filters/photos), and may allow participants to express themselves more freely and comfortably (Cipolletta et al., 2017). Giving participants on video-conferencing platforms the option to include their pronouns next to their name, should they choose to, can also reduce the chances of misgendering. The possibilities for anonymity provided by remote research may be particularly important for gender non-conforming people within countries where this is regarded a crime e.g. Republic of Zimbabwe (Mavhandu-Mudzusi et al., 2022).

Participants from particular religious and cultural backgrounds which emphasise gender segregation in public life (e.g. Muslim communities) can find that remote spaces facilitate interaction across gender lines that would otherwise not have been permissible face-to-face (Piela, 2016; Nisa, 2013).

Muslim women may prefer telephone interviews over audio-visual options because they do not require them to dress modestly (Alsagaff and Coyne, 2023).

People with sensitive or traumatic experiences

Due to its nature, a significant amount of research in health and social care could be described as 'sensitive'. Sensitive topics can be understood as those that are particularly intrusive, intimate, distressing or morbid (Silverio et al., 2022), many of which would fall under the remit of health and social care research, such as bereavement, health, illness and disability - including life-limiting conditions (Chambers et al., 2019), sexuality and reproduction, family life, trauma and abuse (Roberts et al., 2021). Our scoping review (Boardman et al., 2022) found that participants may talk more about sensitive issues in a remote context where they feel more anonymous (although this is not the case where participants distrust the confidentiality of Internet-enabled communication). It is important that researchers consider the sensitivity of their research topic at the point of design, as participants with difficult or traumatic experiences will have specific needs and sensitivities that should be considered early on. Some research topics are more clearly sensitive that others, but researchers should consider the possibility of trauma for all. Qualitative research in particular, due to its depth, is more likely to uncover disclosures of trauma or abuse than other research methodologies (Silverio et al., 2022). The difficulties of 'cross-over' between qualitative data collection and emotional support or therapy have long been documented (Holmes, 2017), and the potentially protracted nature of remote data collection may augment the risk that the distinction becomes blurred.

Remote methods can empower participants through the heightened opportunities for participant autonomy, swifter exit routes and the possibility of participants choosing the timing of their engagement in data collection (e.g. email and instant messaging). **MORE INFORMATION** Methods for managing distress need to be planned in advance, both on the part of the researcher as well as the participant. However, given the heightened opportunities for anonymity in remote qualitative research, researchers need to carefully consider how safeguarding, may operate in this context.

MORE INFORMATION Researchers should support participants to choose the place and timing of their participation in a way that reduces physical and/or emotional risks as far as possible and allow flexibility in data collection to support participants to manage their risk. Researchers also need to consider the dynamics of data collection if this is to occur in a group or individually, and importantly for this population, whether or not a camera will be used.

Intersectionality

Intersectionality is a way of conceptualising identity and its various relationships with power (Abrams et al., 2020). Participants will likely have multiple aspects of their identities that intersect to create their individual needs. It is vitally important that researchers avoid homogenising any participant group and consider intersectionality and the way this impacts engagement with research and the support needs and research experiences of participants. For example, a disability or health condition should not be viewed as the 'master category' of identity. Instead, the researcher should consider its interface with other aspects of identity including ethnicity, migration status, age, gender identity as well as their socioeconomic, cultural and environmental circumstances. Abrams et al. (2020) highlight various ways that this can be enacted.

1. In conceptualisation of the study design, differences and similarities between the identities of researchers and participants should be considered, particularly in research team composition and research question formation. Training participant members to join the research team, reflexive journalling and public and patient involvement have been suggested as means through which power imbalances can be identified. Indeed, ensuring that the research team is aware of how their own identities, and the privileged aspects of those identities, place limits on their understanding of their participant group's intersectionality is critical.

2. In considering the participant group in the research, researchers should 'critically examine the role of marginalisation and the social forces that drive inequities' (Abrams et al., 2020:4) and how they produce the participants' experiences of the research topic. This might include considering how racism, sexism, homophobia, disablism, ageism, stigma and classism combine to produce power relations that inevitably frame

participants' experiences and views, and how these can be factored into recruitment means and methods, as well as the creation of data collection tools such as interview guides.

3. During data collection, researchers should be particularly attentive to ethical concerns such as anonymity, privacy, confidentiality and informed consent as these can involve greater risks for those with multiple marginalised identities. Appropriate training of the research team, collaboration with ethical review committees and close working with members of the participant population can support this process.

For remote qualitative research, an exploration of remote means of communication already used by participants, their specific needs in relation to the consent process, and expectations of the data collection encounter/s, are particularly important.

'Non-genuine' Participants

There are emerging concerns in the qualitative research community about so-called non-genuine research participants. It has been suggested that participants who do not meet study criteria, and indeed may have no lived experience of the phenomena at hand, are volunteering for research studies, and that this is even more likely to occur when research is conducted remotely (Jackson et al., 2023; Reid & Reid, 2005). Including data from these participants, it has been argued, undermines research integrity and threatens data validity (Ridge et al., 2023). Indeed, the impact of disingenuous participants on data validity may be greater on qualitative study designs, where sample sizes are relatively small, compared to quantitative methods with larger sample sizes. Moreover, participation incentives, which have been linked to increased numbers of non-genuine participants, are also more likely to be offered within qualitative studies due to the time commitment and depth of data collection (Wilkerson et al., 2014; James and Busher, 2006). Remote qualitative studies, where the identity of the participant can be intentionally concealed (e.g. there can be no visual or personal indicators of identity) are arguably studies at highest risk of this phenomenon (Drysdale et al., 2023).

Solutions to this issue have been suggested including using platforms where names are linked to profiles including photographs, personal information and social relationships (e.g. Facebook) (Lijadi & van Schalkwyk, 2015). Snowball sampling, pre-data collection screening (Jackson et al., 2023), and using synchronous rather than asynchronous methods (i.e. where there is less opportunity to prepare a 'dishonest response', (Sipes, 2019: 206)) have all been suggested as ways to overcome this threat to data validity (Patton, 2014).

However, there may be a risk that protective measures undermine many of the benefits of remote data collection and threaten inclusive research practice. For example, the additional screening of participants imposes additional burdens on participants, including genuine participants. Similarly, requiring participants to switch on their camera (Sansfacon et al., 2024), will exclude participants who prefer not to be seen for a variety of entirely valid reasons, as outlined above.

Some proposed indicators of inauthentic participants have been suggested in the literature. For example, short emails with blank subject lines, a focus on payment and a reluctance to provide personal data (Ridge et al., 2023). Superficial, short or vague responses during data collection have also been suggested as indicating that a non-genuine participant may have been recruited (Jackson et al., 2023).

Despite growing recognition of non-genuine participants, it is important that researchers are reflexive about the reasons they might be questioning the authenticity of their (would be) participants. Establishing trust and rapport with participants, and especially those from marginalised communities is vital to inclusive and rich data collection. For a researcher to approach potential participants with suspicion may be interpreted as suspicion of the whole community and threaten to undermine not only data collection but ongoing relationships with community partners (Drysdale et al., 2023). Researchers need to recognise that people's reasons for volunteering for research studies when they are not eligible are likely to be complex, multi-faceted and influenced by wider socioeconomic factors. Researchers may therefore wish to reflect on these factors as they design ways to protect data integrity and validity whilst also recognising the need to support and maintain inclusivity.

Summary

Whilst it is important not to homogenise participant groups and assume everyone from a given population will have the same, or even similar, participation needs, this section should be used to prompt researchers to think broadly about facilitating research participation, particularly for population groups that are marginalised, digitally excluded and/or underserved.

It is critical that researchers consider that all participants will fit within several population groups (some of which may be invisible to the researcher), and as such, researchers need to be attentive to intersectionality and the way that power differentials can be cumulative. Being attentive to the fact that strategies put in place to include a particular social group may inadvertently disenfranchise another is particularly important as researchers consider the representativeness of their samples.

Researcher Prompts: Participant Populations

1. **What is the likely level of trust between a potential research participant and you/your organisation? What are the reasons for this?**
2. **Whose voice is likely to be heard and whose will be missed if you choose remote methods?**
3. **What is the likely level of access to digital communication technology among your potential research participants, and how is this likely to vary?**
4. **How comfortable are your potential participants likely to be with using digital communication channels?**
5. **Is the research topic sensitive, or potentially sensitive? How will this be managed within remote research contexts?**

Section 3: Designing Remote Qualitative Studies: Methods and Technologies

Different methods of remote qualitative data collection can be implemented across a range of technologies. Decisions about which combinations of methods and technologies to offer participants requires researchers to have a broad understanding of the different options available, within the resources they have access to, as well as the way communication technologies are typically used (if at all) by their participant population.

The reduced costs of remote methods (Thunberg and Arnell, 2022) may make research possible that otherwise would not have been. However, priority needs to be given to the research question and the needs and priorities of the participant population when deciding which method is appropriate for a study. The factors below may assist researchers as they consider these questions:

Research Design

Remote qualitative data collection methods can be used within a wide variety of research designs, including those with face-to-face components. There has been a rise in the use of 'hybrid' research designs- designs that bring together different configurations of remote and face-to-face data collection facilitated by use of both asynchronous and synchronous technologies and data types (audio, visual and text) (Horn & Casagrande, 2023).

Where remote longitudinal research designs are employed, researchers need to consider how they will keep participants engaged, particularly when there is no face-to-face data collection, and consider how they will embed rapport-building and maintenance across the research design (Weller, 2017).

Flexibility

The flexibility of remote methods, and removal of the stress of travel, can mean increased comfort for the participant, and potentially the researcher too. It has been suggested that this comfort can facilitate discussion of sensitive topic areas (Thunberg and Arnell, 2022; Alkhateeb, 2018; Sipes et al., 2019; Weller, 2017). The removal of travel time can also open up new windows of time for organising focus groups when several people need to be available at the same time (Gibson, 2017a; Keen et al., 2022). Similarly, remote methods of data collection can be easier to rearrange, or delay, than face-to-face data collection (where travel and venue may have been booked in advance) (Deakin & Wakefield, 2013). It has been suggested that this flexibility can mean that participants are more likely to cancel, drop out, or simply not turn up for remote data collection events compared to face-to-face (Self, 2021). However, this can be a benefit for research participants- when conducting research with people with disabilities or complex health needs, having clear and easy ways for them to rearrange, pause or withdraw from the research is particularly important, as noted by Budworth (2023):

> ***"When researching with participants who experience dynamic symptoms, fluctuating energy levels, and sudden changes in circumstances (i.e., unplanned hospital admissions and surgery), withdrawal rates can be understandably high." (Budworth, 2023: 7)***

Similarly, some may find it easier to take part in remote methods, e.g. if they have 'caring responsibilities or commitments that can change at short notice' or, if they do not have to 'transfer though some kind of physical space' to get there (time-saving, cost-saving), or can 'weave it into their everyday life' (source: consensus conference). Flexible research methods enable researchers to acknowledge and support this time rather than attempting to fit the participant into 'normative time' (Budworth, 2023).

The flexibility of remote methods also means that data collection can continue even if circumstances occur that would have otherwise resulted in cancellation (Budworth, 2023; Gibson, 2022). For example, busy healthcare professionals were able to take part in an ethnographic study using WhatsApp because of the great flexibility it offered (Humphries et al., 2022).

This interweaving of data collection into daily life and across longer periods of time, comes with a range of considerations for both researcher and participant. The portability of phones can mean that participants are sometimes multitasking when participating in research, are in transit, or are in otherwise disruptive environments which can limit their ability to engage. While it is important not to make neurotypical assumptions about how participants demonstrate attention, researchers have reported concerns when participants in remote data collection seem distracted. Hammond (2018) noted:

> ***'It was apparent during several online interviews that participants engaged in other activities. One man made cups of tea and changed from his work clothes into his casual clothes and another was chatting to others online at the same time…[…]…I was (naively) shocked that participants were doing other things whereas I was giving my full attention to the interview' (Hammond, 2018: 7)***

Indeed, there are examples in the literature of participants taking part in research whilst driving a car (Oliffe et al., 2021) and even a tractor (Epp et al., 2022). This multi-tasking can have both benefits and disbenefits; while on the one hand the great flexibility of remote methods supports inclusivity. On the other, distractions from the environment can pose significant challenges to engagement (Rahman et al., 2021), risks to confidentiality, not to mention also being potentially dangerous. While it may not be appropriate for researchers to pre-determine which contexts are appropriate for participation on behalf of their participants, when there are concerns around safety and/or illegality (e.g. a participant sending instant messages whilst driving), the researcher should suggest re-commencing data collection at another time and/or immediately halt the interaction.

As well as participants, MORE INFORMATION researchers too may embrace the flexibility of remote to conduct research in unusual contexts, as noted by Gibson (2020):

> ***"On one occasion, I even completed an interview while sitting at the bedside of a family member who was sick in hospital. I was able to move around during the interview with pauses in interaction allowing me to make a cup of tea or occasionally return an urgent email. From some of the short silences between messages, I suspect that participants may have similarly been multi-tasking as is the norm for this generation" (Gibson, 2020: 617-618)***

Multi-tasking is less likely to happen face-to-face where the boundaries of the research are clearer (Parkin et al., 2021; Lathen and Laestadius, 2021) and the everyday norms of communication are different.

The researcher may find that the flexibility of remote, whilst generating new opportunities, can also make it harder for them to 'contain' their field work and establish healthy work/life boundaries (Silverio et al., 2022). Indeed, the relative ease and speed of organising synchronous data collection events can lead to the temptation, particularly in time-constrained projects, to arrange them in quick succession or even back-to-back. With asynchronous remote methods, the researcher may feel that they are always 'on call' and obligated to respond to participants as soon as their responses are received, even if they fall outside usual working hours. This was highlighted by a remote ethnography conducted by Humphries et al. (2022) with health care professionals, the majority of whom responded to the researcher during their night shifts. As such, the 'mental load' of conducting research this way, and the infiltration of data collection into everyday life, needs to be considered at the outset and supportive measures put in place by Principal Investigators. MORE INFORMATION

Synchronicity

Remote methods span synchronous, 'near-synchronous', and asynchronous interactions, i.e. they involve the navigation of a temporal dimension. This often involves some degree of flexibility around when data might be collected and how, and this may change over time in the course of a single data collection 'event' e.g. a participant in a synchronous online interview may want to give some thought to a particular question, which could result in a follow-up email, or an email interview which was intended to be asynchronous ends up being near synchronous due to rapid-fire responses. Although some studies are designed for immediate responses, where possible, it can be helpful to give participants choice over timing, i.e.– how and when to participate, as well as mode of interaction (Salmons, 2011; consensus conference).

Email interviews, for example, are amongst the most flexible type of interviews, and open up the research to participants across the globe. Offering email interviews and other asynchronous methods also allow people with busy lives and complex schedules to participate in research, e.g. adults with caring responsibilities and those with multiple jobs (Gibson, 2017a; Irani, 2019; Flynn et al., 2018). MORE INFORMATION They are also less time pressured for researchers and participants (Gibson, 2017a). However, given that email interviews often take place over a longer period of time than synchronous methods, they are not well suited for research in evolving/rapidly changing scenarios. They are also tricky to maintain if they go on for a long time and participants are more likely to end or drift out of the data collection early (source: consensus conference). MORE INFORMATION. Instant messaging interviews can be a versatile alternative to email interviewing, and can be used in asynchronous, near-synchronous or synchronous ways to suit participant and project needs. (source: consensus conference)

It is important to remember that for all asynchronous methods, participants have time for reflection and editing, which can lead to more polished accounts of their experiences (source: interview with researcher; Cook, 2012) whereas self-editing will be more apparent in audio data as people re-articulate ideas for example (source: interview with researcher). The opposite argument has been made that busy participants may 'write the first thing that comes into [their] head' leading to less thoughtful reflections (source: consensus conference). The significance of these factors for analysis may depend on the underlying epistemology, and whether interview data is seen in a realist frame or as a co-constructed narrative between researcher and participant (and technology) (source: interview with researcher).

Focus groups and group interviews can also be conducted asynchronously (e.g. by WhatsApp/ Facebook Messenger). Facilitation of asynchronous remote focus groups, and ensuring everyone has a chance to speak, can be easier than in face-to-face focus groups. For example, WhatsApp allows overlapping threads so that the links between the various contributions can be tracked. These can also be used to prompt non-dominant participants to express themselves and respond to what is said by any dominant participants. However, whilst supporting inclusivity, remote focus groups can make it harder for the researcher to sustain participant engagement, particularly participants who are multi-tasking (Chen and Neo, 2019; Lathen and Laestadius, 2021; Woodward et al., 2020). Text-based methods will also not be equally accessible to all. Neo et al. (2022), for example, found that typing speed could set the 'pace' of focus groups and had an impact on how participants could engage - both in the context of synchronous and asynchronous data collection. When synchronous, participants could get 'left behind' the conversation, and when asynchronous they could be put off by high volumes of messages on a thread for them to read before contributing.

Technologies, platforms and applications

In order to conduct a remote qualitative study, researchers need to decide which technology, or technologies, they will use to collect data. It is important that researchers adopt technologies that are best suited to their particular project and research question/s, but that also accommodate the needs and preferences of (would be) participants. Whilst technologies will continue to evolve over time, and researchers, institutions and ethics committees will need to continually adapt to their changing capabilities and ethical complexities, the broad principles which guide their selection remain broadly the same:

1. There is evidence that **using participants' preferred technology and/or software/ applications to gather data** supports inclusivity and participation rates and produces higher quality data (Enoch et al., 2023). Indeed, familiarity with the medium, and its pre-existing integration in a participant's life have been identified as important factors in determining uptake of research invitations (particularly amongst older adults and underserved populations) (Sedgwick and Spiers, 2009; Ward et al., 2015). MORE INFORMATION It has also been shown to support the development of rapport and enhance the participant's experience of being involved in the study (Humphries et al., 2022; Sedgwick and Spiers, 2009). However,

these accommodations of participants' preferences and abilities (and their facilitation of good quality data collection) have to be weighed against the requirements of institutions (Poliandri et al., 2023), funding bodies, ethics committees and relevant legislation (e.g. General Data Protection Regulation, 2016). Data security is a key responsibility of researchers, and whilst participants may already use a particular technology within their own lives, when re-purposed for research, the attendant responsibilities and governance structures that accompany its use need to be carefully considered. However, this must be balanced against the imperative of social justice, to ensure that the outputs and benefits of health and social care research are more evenly distributed across social groups.

2. **Accessibility** is a key consideration. It is important that researchers consult with advocacy groups, charities, community groups, as well as with would-be research participants directly to better understand and support their inclusion needs (Budworth, 2023; Waterhouse et al., 2022). The use of accessibility consultants and charities (e.g. AbilityNet, W3C) may also be an option, particularly for the remote recruitment of participants who are likely to have a range of access needs. AbilityNet and W3C have a wide range of free resources which outline solutions for access issues to the digital world. Researchers should allow sufficient time and funds to support the assessment and balancing of accessibility needs. Some of the concerns around remote data collection, such as 'Zoom fatigue' may be heightened for people with disabilities, e.g. neurodiverse people will often 'mask' their symptoms in social situations, such as data collection, which causes fatigue, so the use of pre-scheduled or participant-directed breaks, or the ability to switch to alternative technologies may be necessary (Yuruki & Inoue, 2023).

3. **Technology Deprivation**. Access to technologies is restricted for certain social groups, and this needs to be accounted for within research designs. Underserved populations are more likely to live in 'digital poverty' which means they may not have email addresses for study documentation to be sent, or devices capable of accessing the necessary apps (such as WhatsApp) (source: consensus conference; Digital Poverty Alliance, 2022). Higher education levels and employment outside the home have conversely both been associated with greater access to email and technologies (Taylor, 2007). **The demographic features of users of technologies will therefore significantly impact data produced, and these demographics will likely change over time along with changing technologies. Researchers need to keep up-to-date with patterns of technology use, digital skills and access and be mindful of whose voices are excluded by technology choices.**

4. Ideally, participation **should not rely on participants downloading new software/apps**. Requiring this can exclude participants who do not have the necessary resources (e.g. data plan/storage space/operating system), or necessary skills, for participation. MORE INFORMATION It has been suggested that this can be addressed by researchers providing IT support and equipment prior to data collection e.g. phones, signal boosters, data credit vouchers etc. (for examples of studies where this support was provided see: Banbury et al., 2020; Carter et al., 2021b; Dayha et al., 2023). 'Trying out' the technology with each participant prior to data collection can help build rapport as well as solving any technical issues (Thunberg and Arnell, 2022). MORE INFORMATION This would need to be planned into the research process in advance.

5. Researchers need to be up-to-date with the communication technologies MORE INFORMATION in use among their intended participant population group (source: consensus conference); (Humphries et al., 2022), as well **as the norms of communication/etiquette** typically used on that platform. It is also important not to homogenise participant groups by assuming that everyone from that group will want, or be able to use, the same remote method.

6. Researchers should carefully consider the **unique features of the technologies** they want to use. The 'chat' function of video-conferencing platforms, for example, can be useful for asking questions without disrupting flow within fast-moving focus groups. Giving participants access to these non-threatening spaces to ask clarifying questions or make their contribution is an important aspect of inclusivity (Chen and Neo, 2019). With video-conferencing platforms, the option for different forms of communication to occur simultaneously (audio/video/chat/reaction

emoji) allows data to be captured that might otherwise be lost because of social norms about turn taking (source: interview with researcher). Similarly, the overlapping threads of WhatsApp and the ability to see when a message has been read (even if not responded to) can be useful in asynchronous data collection (Humphries et al., 2022), and the timed disappearance of Snapchat messages can make use of the application for research participation less threatening. Indeed, the capacity for privacy may be the more important mediating factor for participation and disclosure than the remote technology per se (source: consensus conference). MORE INFORMATION New software is also emerging that has been specifically designed to gather remote qualitative data, such as itracks (which offers new features- such as a 'back room' for unobstrusive observation of focus groups, or facilitating completely anonymous text-based focus groups), QualMeeting® and Discuss. However, research participants are highly unlikely to be familiar with research-focused platforms and may be wary of using them. Researchers wanting to use research-focused platforms will need to invest time in assisting participants to use them, which may need to be face-to-face, depending on participant group (source: consensus conference).

MORE INFORMATION

Data Collection Methods, Technologies and Analysis

Researchers need to consider at the design stage the format, quantity and depth of qualitative data that a particular technology is capable of facilitating, and how this will impact methods of analysis.

Data produced through the use of remote methods can be similar to that generated by face-to-face, but there are also features that are unique to remote methods. Written text (e.g. through email or text message data collection etc.) can be very different to verbatim text in terms of its cohesion and readability. It may also include typos, emojis, particular uses of grammar to facilitate understanding (e.g. multiple exclamation or question marks) and different stylistics (font, underlining, italics) absent in verbatim text. Some remote spaces (e.g. chat rooms) and social groups (e.g. young people) have their own community etiquette, vernacular and communication norms (e.g. acronyms or 'textese'/ideograms/ memes) that the researcher may need to become acclimatised to in order to make sense of the data (source: consensus conference). Researchers may need to seek clarification during data collection (Hammond, 2018), as well as consider whether, and indeed how, they will incorporate these language features into their analyses. Approaches are emerging exploring the intersection of emojis with language in the creation of meaning (Logi and Zappavigna, 2021; Halverson et al., 2023; Westbrook, 2023) and qualitative software such as MAXQDA can accommodate emojis in analysis. Research has pointed to their use as a way of compensating for a lack of visual cues in this type of communication, as a means of reducing ambiguity in interpretation (Halverson et al., 2023) and also enhancing cross-cultural communication (Alshenqeeti, 2016), however the evidence is conflicting and may be highly dependent on the social background of the participant(s) (Kimura-Thollander and Kumar, 2019; Bresciani and Eppler, 2015).

Researchers may also need to consider whether, and how, any fieldnotes will be incorporated into the analysis. These fieldnotes may include reflections on the establishment of rapport, whether or not there were any other (non-participant) people present during data collection, descriptions of the physical environment the participant is in (video conferencing) and any evidence of distractions (e.g. participants scrolling online during data collection, noises in the background, doorbell). Whilst these factors may assist in the interpretation of the resulting data, whether or not they will be used in this way needs to be clear during the consent process, particularly if the taking of fieldnotes is not visible to the participant. MORE INFORMATION

As well as introducing new forms of data, remote data collection can also bring challenges to the overall coherence of data. Text-based asynchronous focus groups, for example, can sometimes involve large gaps between responses (due to participant availability or access to network coverage) which can make discussion threads hard to follow, especially as some apps (e.g. WhatsApp) do not include the links between threads (i.e. which previous text a participant is responding to) when the chat is exported for analysis (Singer et al., 2023). In longitudinal research, the technologies used to collect data at different timepoints may change or switch between face-to-face and remote (e.g. Weller, 2017) and need to be considered at the interpretive stage of the analysis.

In addition, it is possible that participants will use the technology in ways other than the researcher intended (Singer et al., 2023). Use of 'disappearing messages' (i.e. those that are 'disappear' immediately after they have been read), or the 'voice note' function in the context of a text-based interview or focus group can mean that the researcher receives forms of data in different formats than they had anticipated, which can impact their analytic approach given the significant differences between verbatim and written text. Furthermore, some languages have marked differences between written and colloquial formats, as well as local dialectic differences. This can result in very different data when gathered using verbal or text-based technologies and data gathered across geographical regions (Douedari et al., 2021). Finally, researchers should consider the quantity and depth of data required to undertake their approach to analysis, as well as the timeframe for generating it. Text-based asynchronous methods, such as email for example, can be challenging for a researcher wishing to undertake a grounded theory approach (whereby sampling is informed by emerging analyses), due to the timeframes involved in generating insightful data. However, as noted by Fritz and Vandermause (2018), the lengthy nature of email interviews can also mean that high quality data emerge as participants have scope to carefully craft their accounts. There are, however, instances where generating a large quantity of data per participant is inconsistent with the study's aims and design, or where 'polished' accounts mask complexity and nuance. In the context of mixed methods research as well, shorter, focused answers across larger numbers of participants can aid data transformation and/or its integration with quantitative data (Griffiths et al., 2014; Boardman et al., 2011).

Summary

Overall, there is a need to explore the needs and preferences of the social group being studied, the context of the research, the impacts of intersectionality and also the researcher's own positionality when considering which technology to use in remote qualitative data collection.

MORE INFORMATION

Offering a range of methods for participants to choose from (including both face-to-face options as well as remote as far as is possible) represents a political commitment to the empowerment of participants, particularly those who are most sensitive to power differentials due to legacies of social and political oppression (Budworth, 2023; Jackson et al., 2023; Ślęzak, 2023). Whilst methodological choices will ultimately be shaped by the research question(s), resources, ethical considerations, institutional and legal regulations and pragmatic considerations, such adaptive hybrid research designs are the most inclusive and can flex to meet participant and researcher needs (Mirick and Wladkowski, 2019).

Researcher Prompts:

1. **How much do you know about how your potential participants communicate digitally? How does this vary across your population of interest? How could you engage with relevant communities to find out more?**
2. **What is the likely pattern of life for your potential participants – when will they be able to make time for responding to you?**
3. **How important is synchronicity within your research design?**
4. **How/can technologies, platforms and applications be used to support inclusivity for your particular research design?**
5. **What is your optimal balance between the benefits of offering choice of digital modality to participants and the challenges of analysing data collected using a range of modalities?**

Section 4: Preparing for data collection

Supporting Participants to Prepare for Data Collection

Remote qualitative data requires preparation in the same way that face-to-face data collection does, with the additional need to ensure that participants can effectively and confidently use the proposed technology. Effective preparation can enhance rapport, reduce the chances of technological failure at the data collection event(s) and ensure that participants are empowered to control how much information about themselves will be shared through use of the technology before this occurs. This can be particularly important for participants who are unfamiliar with the technology.

It is important to provide information and support prior to data collection, and ideally from the person who will be undertaking the data collection (source: consensus conference). In some cases, there may need to be some in-person contact during information sharing about the research in order to establish rapport and support the consent process before data collection commences (Boland et al., 2022; Dahya et al., 2023). This can be particularly important for groups with higher support needs during data collection (e.g. people with learning difficulties) or those where trust is a concern (e.g. underserved populations, people who have experienced trauma). For participants who are neurodivergent (Szulc, 2023), or in instances where the research topic is particularly sensitive or traumatic, researchers may need to provide one-to-one support to facilitate consideration of what participation might look like for them. MORE INFORMATION

A video presentation on the background of the project and participant information sheet enables would-be participants to see the researcher/hear their voice, which can help with trust and rapport-building (Tarrant et al., 2023).

Although not always necessary or appropriate, it has been suggested that for some studies, including a psychologist in potentially distressing focus groups (or involving mental health professionals with the design of the study (Epp et al., 2022)) can support participant wellbeing and safety and allow the researcher to concentrate on the data collection (Douglas et al., 2021). Moreover, as remote methods have enabled data collection across different time zones, it is also important to consider the additional burdens that synchronous data collection outside of usual working hours or at antisocial hours can have on both participants and researchers (Carter et al., 2021a).

Supporting Participants to Prepare for Technology Usage

Aside from establishing trust and rapport prior to data collection, it is also important to offer support with the technology, platform or app that will be used to collect the data. This helps to ensure that participants have access to and are able to use the technology as required (Carter et al., 2021a; Carter et al., 2021b). This preparation might take the form of a test video call or online chat to point out or demonstrate the technology's features (e.g. how to send the researcher private message), or provision of the technology itself. It is important that participants are made aware of how much personal information is visible to the researcher, and support offered to set up a virtual background if needed (Carter et al., 2021c). For participants in group data collection, support may be needed to set up alias identities and accounts to facilitate privacy and ensure personal accounts are not made available to other participants (Douglas et al., 2021). For participants with specific access or support needs, technology set up meetings are particularly important. Archibald et al. (2019) noted that 88% of their 16 participants (nurses, being interviewed by Zoom) experienced some sort of challenge in joining their remote interview on the day of data collection. These challenges included issues with bandwidth, webcam/microphone malfunction, low device battery and outdated hardware. While some of this technological set-up will invariably also take place at the start of the data collection event, it can help to address some of the 'preventable' technological challenges, such as outdated or incompatible software, establish rapport and protect the data collection time when done in advance. As noted by Gray et al (2020), having a 'back up plan' (e.g. switching to telephone) (Gray et al, 2020: 1296), that is shared with participants in advance, in case of technology failure can help prevent loss of data or re-arrangement of the data collection event.

Taking Consent Remotely

In line with the rise in remote qualitative research, there has been an attendant rise in the taking of 'e-consent', i.e. consent taken from participants electronically, whether through the use of information sheets and consent forms sent through document transfer systems, webpages or through platforms such as REDCap. Other forms of remote consent include verbal consent via telephone or video-conferencing platforms, however, these forms of consent are typically accompanied by supporting consent documents. Consent forms can also be completed electronically, but face-to-face, e.g. a participant adding a signature to an electronic form displayed on a tablet. The participant's technological proficiency needs to be taken into account, and they may need support with adding an electronic signature. Visually impaired participants, for example, may need the consent form read to them and verbal consent recorded (Engward et al., 2022).

Taking e-consent has benefits, including environmental benefits (reduced need for paper, printing, physical storage and methods for safe disposal of hard copies), and electronic consent forms and information sheets can have audio visual enhancements and hyperlinks where additional information can be provided to enhance understanding (Tait & Voepel-Lewis, 2015). The screen sharing option for video-conferencing technologies can also support researchers to go through the form with participants in real time either before or during the data collection event. For marginalised/stigmatised groups or those associated with illegal activities, the processes around informed consent may require additional thought. For these groups, needing to sign a consent form can, in itself, be a barrier for participation, and consultation with research ethics committees to devise alternative methods to document consent may be indicated (Abrams et al., 2020). The use of video to accompany information sheets and consent forms can also make the consent process more inclusive, supporting the participants with additional needs, as well as standardising the consent process (Sonne et al., 2013). However, it is important that videos are not used as an alternative to contact with the research team to discuss study procedures and the implications of participation. Welch et al. (2016) have developed the term 'teleconsent' to describe a method whereby researchers and would-be participants meet on a video-conferencing platform in order for the researcher to guide them through the consent form in real time, addressing any questions or clarifications as they arise. Despite these possibilities, it has been suggested that use of paper copies should not be entirely abandoned (Skelton et al., 2020). Some participants prefer or need hard copies, and this should be accommodated as far as possible. Hard copies can be sent through the post with stamped addressed envelopes for returns.

Key considerations for researchers taking consent remotely:

1. Have enough resources been factored into the research to allow for the development of consent materials, as well as printing/postage costs?

2. If your participant group is adolescents, how/will it be possible to confirm the age of the participant (and consequently whether parental consent is required)?

3. Will a typed signature be accepted, or are photo signatures or wet ink signatures required by ethics boards?

4. How can consent forms be securely transferred between researchers and participants in line with GDPR regulation?

5. For video-conferencing platforms- does the consent form specify whether audio alone or audio visual is being recorded? It is critically important to make it clear to participants when the data collection is starting, and what 'counts' as data, a process that can be obscured by use of remote methods (Marlowe and Allen, 2022; Boland et al., 2022). For example, whether this includes visual data from the background or visible environment of the participant (source: consensus conference), whether interruptions from other people in the participant's environment are noted, whether use of emojis, reactions and GIFs (source: consensus conference) are treated as data, and also whether any text posted in the chat function of a video-conferencing platform will be included alongside a transcript.

6. How can the 'just tick yes' phenomenon (Rowan et al., 2017) be mitigated when consent forms are completed without researcher presence?

7. Remote methods, in particular remote focus groups, can provide participants with a greater number of opportunities to break the confidentiality of others. Given this context, it is important that all participants understand that recordings, photography, or screenshots are not permitted, but also the limitations of confidentiality in focus group settings (Lobe et al., 2020).

Summary

Preparation for data collection is critical, particularly when using remote methods. Supporting participants to use the technology that will be used is particularly important, as not being able to navigate the platform can have significant negative impacts on the participant's experience of research participation and can result in lack of engagement or drop out. Some participants will need more support than others, and it is important that time to explore the technology with the participant is allowed for within the research timeline.

For valid consent, it is important that participants have considered the potential impacts of their participation, where they will participate, and how their data will be handled after collection. Consent, and in particular, clarification regarding what will be 'counted' as data and what will not, is especially important in remote methods. Extraneous, or 'silent' data can take many forms (e.g. backgrounds in video-conferencing, emojis, profile pictures on WhatsApp accounts), and those less familiar with the technology are more likely than those proficient with it to share more of this type of data than they may intended. MORE INFORMATION Drawing participants' attention to the types of data that will be visible when using the technology is essential.

Developing robust procedures for documenting consent, and also re-iterating it as appropriate, are critical. Remote consent needs to include methods for securely transferring sensitive information, which may include encryption and password protection of associated files and secure file transfer.

Researcher Prompts:

1. **How well do you understand the access needs of your participants?**

2. **How important are pre-data collection activities for the population being studied? How can they be used to support data collection itself, without over burdening participants? Are there sufficient resources allocated to the research to allow for these activities?**

3. **Will your chosen digital communication channel(s) allow for your chosen consent processes and the requirements of ethics approvals?**

Section 5: Collecting Qualitative Data Remotely

Breaking the Ice

All researchers need to 'break the ice' with their participants, but this can be particularly important in remote data collection contexts where there can be fewer opportunities for rapport-building pleasantries and small talk (arrival at venue, taking off coats, arranging seating etc.) and the move from introductions, consent and into data collection can feel abrupt. Ice breaking activities can not only put participants at ease when they first meet the researcher, but can assist with setting up the necessary conditions for rapport that can be carried through the data collection

Given the additional distance in remote contexts, the researcher may need to consciously plan some 'ice breaking' activities with participants, particularly for remote focus groups or group interviews where there are no pre-existing relationships between participants, and many people are meeting both 'cold' and remotely at the same time (Bolin et al., 2023). These can be done in advance of the data collection, or at the start of data collection, but time needs to be planned for this so it does not negatively impact data collection. Engward reflects on her experiences of conducting interviews via video-conferencing, and the dedicated efforts needed to put participants at ease:

> ***"I always logged onto the online meeting room 10 minutes before the meeting, just in case the participant was early, as it would show that I was keen to meet them. Initial introductions were about us, our surroundings and features of interest, often a house pet and I explain that this introductory conversation was not part of the interview or being recorded. I offered both a chance to get a drink because often when visiting participants in their home environments hot drinks are offered."***
> ***(Engward et al., 2022; 5)***

Similarly, online chat, or email exchanges are alternatives to ice breakers that can help develop trust and rapport prior to data collection (Khan and MacEachen, 2022), as can sending topic guides in advance so that participants know what to expect (source: consensus conference).

When collecting data remotely from children/ young people in groups, it can take time to build rapport, but this can be catalysed by allowing time at the start of the interview specifically for rapport-building, for example, providing a group task to work on (Hennessey et al., 2022; Tailor-Hamblin, 2024).

Researchers should consider what existing resources are available to support this relationship building with, and between, the participants in their population of interest. Resources are available to support these activities, such as Generation R, which is an NIHR funded network of young people's advisory groups designed to input into paediatric health research. Generation R provides various age-appropriate activities (such as games, puzzles and quizzes) to engage young people in research design and delivery, and similar techniques have been found to help build rapport with adult groups (Samardzic et al., 2023).

Establishing and Maintaining Rapport

Rapport has long been considered a hallmark feature of productive qualitative data collection. There are instances where rapport with participants may not be achievable, or even desirable (Schmid et al., 2024) due to its potential for exploitation when used as a tool to 'extract' data from disempowered participants through 'simulated friendliness' (Duncombe and Jessop, 2012). In most scenarios, however, researchers aim to cultivate a relaxed, supportive, respectful and 'safe' environment in which participants feel able to share their experiences and views (Seidman, 2006; Horsfall et al., 2021), a model more akin to 'allyship' (Musesenga, 2024). Remote technologies used to gather qualitative data may introduce new barriers as well as facilitators to building interpersonal trust with participants, and it may be challenging to distinguish between the impact of the technological medium itself and other influences on rapport, such as the topic, method, or influence of the researcher.

For participants, connecting from their own familiar environment can help them to feel comfortable, which is conducive to rapport building (Boland et al., 2022). Remote data collection reduces the pressure of physical presence for the participant (no perceived need to tidy the house, no visible recording equipment, no researcher physically present) which can increase the ease of the participant so that rapport can be more easily established (Weller, 2017). The researcher can also support rapport-building by making their environment visible (Boland et al., 2022) and demonstrating reciprocity. It is important to consider, however, that although some participants may find this reassuring, others may find this distracting or inappropriate (source: consensus conference).

Evidence about technical difficulties (e.g. weak internet connection, screen 'freezing') is contradictory. While this can be disruptive to data collection and reduce rapport by interrupting important initial greetings and small talk (Weller, 2017), the shared experience of sorting out technical issues has been purported to help build rapport in some instances by impacting power imbalances between research and participants (Boland et al., 2022). MORE INFORMATION

Using remote methods of data collection inevitably means the removal of some of the rituals of face-to face data collection: removing coats, seating, setting up the audio-recorder. Whilst these activities do not constitute part of the data collection itself (indeed there is an ethical imperative to not report these aspects if the participant has not provided consent), they can nevertheless function as a space for researchers and participants to mentally prepare for, and later decompress from, data collection. Some of these activities have remote equivalents (checking mics, camera position etc.), but these may be better placed in a separate meeting with the participant prior to data collection as they may take longer to complete, and any problems not identified in advance can derail the data collection event altogether (source: consensus conference). MORE INFORMATION The absence, or shortening, of this 'set up' space, directly before data collection can make remote rapport harder to establish (Amendah et al., 2014).

t'Hart (2021) argues the opportunity for 'deep listening' is lost online, which in turn negatively shapes the interaction:

> ***"I argue that deep listening occurs in the emotional connection that is fostered largely by allowing both interviewer and participant to sit together in silence and communicated via the physicality of body cues. I argue that it was particularly this layer of communication that was [negatively] affected by the transition to an online presence" (t'Hart, 2021: 292).***

A lack of deep listening may particularly affect research on sensitive topics MORE INFORMATION (e.g. post-abortion narratives), reducing the detail and quality of the story told ('t Hart, 2021). However, for those uncomfortable with silence (both participants and researchers), this can be experienced as oppressive and uncomfortable, and it can make it hard for participants to anticipate what is coming next (source: consensus conference), particularly for those who identify as neurodiverse (source: PRG). Indeed, by avoiding the 'physicality of bodily cues' (t'Hart, 2021) remote data collection methods may enable inclusion and participation from people who find bodily cues hard to read, who feel anxious or upset by silence or 'closed in' if someone is too close physically (e.g. people who have experienced trauma, those who are neurodiverse) (source: consensus conference; PRG).

Some rapport-building activities used in face-to-face data collection, such as providing a hot drink can be replicated somewhat in remote contexts (e.g. allowing time for both parties to prepare a drink and bring it to the research space as previously noted by Engward et al, 2022) to make participants feel more comfortable and relaxed as they are co-engaged in a quasi- social activity with the researcher (Harvey et al., 2023). Other researchers have couriered snacks for participants to consume during data collection (source: interview with researcher). Whilst this is not always appropriate (e.g. religious fasting periods, participants with eating disorders), it can be experienced as an 'equalising' experience and contribute to flattening power relations (source: consensus conference). MORE INFORMATION Some participants, particularly those from marginalised populations, feel more comfortable if a trusted supporter can be present for interviews (Piacentini et al., 2022), and their presence can facilitate the development of trust and rapport.

Individual data collection using video-conferencing platforms

Video-conferencing platforms are now widely used both within and outside of workplaces (e.g. Zoom, Skype, MS Teams). For research purposes, they arguably represent the closest semblance of a face-to-face interview (Archibald et al., 2019). They have many benefits for qualitative researchers including automatic transcription (of varying accuracy) (Epp et al., 2022), chat functionality (where participants may want to type something that they are uncomfortable about saying out loud) (source: interview with researcher), MORE INFORMATION and easy exit routes should the participant want to leave abruptly. Moreover, there is growing evidence that similar levels of rapport can be built in an interview between participant and researcher whether remote or in-person (Harvey et al., 2023, Boland et al., 2022, Weller, 2017, Engward et al., 2022, Hanna and Mwale, 2017, Khan and MacEachen, 2022) including for underserved populations (Harvey et al., 2023, Jenner and Myers, 2019). Visual cues are still present and these help to build rapport and trust by assisting both researchers and participants with reading facial expressions, identifying distress or discomfort, supporting lip reading, gauging how engaged the other person is and providing contextual information (Gray et al., 2020; 't Hart, 2021). Visual cues can also provide reassurance to participants because they can see the encouraging reactions of the researcher, interpret the direction of the conversation (via both positive and negative reactions) and demonstrate they are committed to the interview by not multi-tasking (source: consensus conference). Indeed, being able to see the other person can also assist with the participant's focus (source: interview with research participant).

This heightened concentration and rapport can deepen the conversation, leading to more relaxed and longer interviews (source: interview with researcher). However, it is important to also consider that for some participants, seeing the researcher can be uncomfortable or distracting (source: consensus conference), and the researcher needs to be led by the needs and preferences of the participant. Use of video-conferencing can mean that the researcher gains access to a participant's natural or chosen setting e.g. their home in the background, which can add contextual data, that might not otherwise have been available to them (source: consensus conference). MORE INFORMATION Indeed, being able to see (some) background behind the participant or researcher can change the tone and dynamic of the data collection (Oliffe et al., 2021) and the way participants interpret the encounter, for example, by dissolving professional boundaries because a researcher's home environment is on display (source: interview with research participant).

Whilst reducing the 'professionalism' of the data collection, 'intimate' backgrounds, such as the researcher's home, potentially complete with the interruption of pets or people (e.g. deliveries, children) or interruptions in the digital space (e.g. email notifications popping up on the screen), can, however, be experienced as empowering for participants. By humanising the researcher, the choice not to obscure their background can be a deliberate attempt by the researcher to 'level up' power differentials, support inclusivity and suggest reciprocity in ways that aren't possible in face-to-face research encounters (source: consensus conference; Ollife et al., 2021).

Despite these various benefits of video-conferencing, however, there are a wide range of factors that researchers need to consider before adopting this method:

1. **Technology:** Not all participants will have access to a good quality (HD) camera (Digital Poverty Alliance, 2022). MORE INFORMATION It is important to consider the quality of the resulting video stream (specifically whether it will be suitable for detecting and interpreting visual cues), as well as the voices that will be silenced or excluded if webcam use is mandated. MORE INFORMATION

2. **Anonymity and Sensitivity:** Use of cameras can reduce a participant's anonymity as data collection is often recorded. This needs to be considered especially for hidden and underserved participants. A researcher may obtain richer descriptive data when participants talk about their experience (particularly in relation to a health problem) when they cannot see you as it creates psychological distance (Trier-Bieniek, 2012, Ward et al., 2015). However, there is also evidence that participants discussing sensitive issues sometimes prefer to see the researcher face-to-face for discussion of sensitive topics (Dempsey et al., 2016), underscoring the need for researchers to explore participant preferences prior to data collection. MORE INFORMATION

3. **‘Zoom fatigue’**: Zoom fatigue is a term used to describe cognitive, emotional and social tiredness that comes from communicating visually via technology online (Lee, 2020). Whilst a term originally tied to use of the Zoom platform, it is now used as a shorthand to describe screen fatigue across video-conferencing platforms. Nadler (2020), however, has argued that Zoom fatigue is not caused solely by staring at a screen – a behaviour we have been engaging in long before the pandemic – but rather by the complexity of mediating interpersonal interactions through video-specific spatial dynamics, which combine and ‘flatten’ people, their backgrounds and technology (2020, p. 1). For participants who use sign language to communicate (a visual, gesture based language), this ‘flattening’ can have a significant deleterious effect on the quality of communication (Xia Ang et al, 2022). MORE INFORMATION This embodied transformation requires ‘additional cognitive effort to interact with others through video conferences’ (Fauville et al., 2021b). Zoom fatigue has also been found to (more) negatively affect women (Fauville et al., 2021a, Ratan et al., 2022), ethnic minorities (Ratan et al., 2022), people who identify as neurodivergent (and so are likely to already be working hard to manage their responses and reactions (Yuruki & Inoue, 2023; PRG)) as well as those with cognitive challenges who may already be experiencing difficulties with episodic memory in response to the open questions that are typical of qualitative research (Norris and Maras, 2022; consensus conference). People who ‘…already experience heightened awareness of their bodies in interpersonal encounters’ (Osler and Zahavi, 2023), such as those with particular health conditions or disabilities, may also be more susceptible to zoom fatigue (source: consensus conference). There are consequently equity and inclusivity implications for data collection gathered through video platforms. While breaks have been suggested as a means to manage Zoom fatigue, the length and timing of this break may need to be carefully choreographed - five minutes may not be enough for participants with particular disabilities or health condition, requiring what Kafer refers to as a ‘reorientation of time’ to re-imagine expectations of what can be achieved within a given amount of time (Kafer, 2013: 27). Neurodiverse participants may also need breaks to fidget (source: consensus conference; PRG). Researchers should therefore check the support needs of their participants in advance of the data collection, rather than during the event itself, and be attentive to signs of fatigue. Other techniques to manage Zoom fatigue include providing participants fidget toys (source: consensus conference; PRG), MORE INFORMATION careful planning and structured questioning to ensure interviews do not ‘overrun’, the provision of an interpreter, reaffirming the participant’s right to turn their camera off, providing participants with a list of questions in advance of the data collection, using prompts and sticking to a pre-determined structure (source: consensus Conference; Szulc, 2023). Participant-led research planning (including when to schedule the interview) may also reduce Zoom Fatigue for these groups (source: consensus conference). To avoid zoom fatigue in the researcher, data collection events should not be scheduled back-to-back (source: consensus conference). MORE INFORMATION

4. **Identity and power negotiations**: Assuming access to the technology, the ability to control whether or not the camera is on, how it is positioned and whether or not a virtual background is used are all decisions that the participant is free to make in line with their needs and preferences. Whilst some participants will choose to have their camera on in order to bond with the researcher or feel ‘seen’ (source: PRG), others choose to distance themselves from the researcher or conceal themselves in order to feel safe enough to connect (Prior and Lachover, 2023). These decisions should not be considered one-off events, but rather part of an ongoing negotiation of what data are transmitted between researcher and participant (e.g. cameras may be off or on depending on the questions posed, a virtual background may be put up because another person has entered the space). Indeed, collecting data remotely through video-conferencing brings new choices for researchers and participants alike, including what is revealed or made visible, if at all, on screen. Generally, for a researcher to benefit from visual cues, the participant needs to be sitting back with their upper body visible (Jenner & Myers, 2019). However, they will ultimately have little control over the way the participant sets up their camera, nor the way that they present themselves. In the age of Instagram and TikTok, there can be

a perceived need to 'perform' for a camera, which can shape the ways in which people ask and answer questions. Moreover, markers of identity (e.g. a wheelchair or assistance dog) may be placed out of view, allowing participants and researchers to bypass some of the 'identity negotiations' often found in face-to-face research (Brown and Boardman, 2011). What is shown/seen onscreen is always limited by the camera view, and frequently curated (Arntson and Yoon, 2023), shaping the resulting interaction (Osler and Zahavi, 2023; Brown and Boardman, 2011). Despite the challenges of performative identities, participants can experience their possibility as empowering - control and autonomy usually afforded to the researcher alone are transferred to the participant. Researchers can help participants to feel at ease by giving them choice and agency about whether and when to turn their cameras on or off. This may also help to mitigate against 'zoom fatigue' (source: consensus conference).

5. **Mirror anxiety** (Fauville et al., 2021a) or facial appearance dissatisfaction (Ratan et al., 2022) can limit the level and duration of engagement online when cameras are turned on, and may affect rapport (Rahman et al., 2021; Brown, 2022). Whilst for some participants, being able to see themselves can be helpful, for example, a neurodivergent participant may find the self-view useful for monitoring their own facial reactions (research participant interview; PRG). To avoid the discomfort of seeing themselves or being seen by others, some people switch off their cameras, which can lead to shorter engagements.

   As an alternative to switching off cameras, some video-conferencing platforms allow participants to hide their image from their own view while still allowing it to be seen by others in the meeting; this could be used by participants (or researchers) affected (or distracted) by seeing their own image.

6. **Physical containment**: Typically, video-conferencing with cameras on usually requires the user to stay in one place with little movement. Feeling physically trapped contributes to 'Zoom fatigue' (Fauville et al., 2021a) and some people find this uncomfortable. Reduced physical movement during data collection may reduce people's ability to interpret each other's movement style or vitality (Osler and Zahavi, 2023). Indeed, seeing someone's gestures and bodily movement in physical space contributes to social understanding (Osler and Zahavi, 2023). When an individual's physical movement is restricted to the on-screen frame, this may reduce the richness and length of the data collection interaction.

7. **Emotional and cognitive burden:** Researchers using video platforms may experience the cognitive and emotional burden of needing to visually demonstrate listening and empathy, and this can translate to heightened facial expressions (Lathen & Laestadius, 2021). Indeed, more so than in face-to-face communication, video-conferencing imposes a greater cognitive load through this effort required to 'produce and interpret nonverbal cues' (Fauville et al., 2021a:2). It takes work to communicate visually through technology (Engward et al., 2022). Cognitive load can also be heavily affected by disconcerting micro-delays in communication (Topping et al., 2021). Micro-delays may be amplified for research participants with communication disorders, neurodiverse needs or living with acquired brain injury (Anglade et al., 2022, Topping et al., 2021), with possible implications for inclusivity of qualitative data collected using visual technology. In order to support participants with their full attention in the digital space and to manage the cognitive load, researchers should prepare for video-conferencing data collection by reducing distractions in both their physical and remote environment as far as possible, for example, by using a private space to conduct the data collection where they won't be disturbed, silencing phones and signing out of email inboxes.

8. **Eye contact:** The 'more intense level of eye contact' that comes from the participant and researcher looking directly at each other onscreen may be interpreted as 'expectancy of response', leaving little time for thoughtful pausing or reflection during the conversation (Engward et al., 2022: 2). This may affect the quality of the data collected, while also reducing the duration of the engagement. Yet, it is simultaneously impossible to establish 'joint attention' onscreen (i.e. to look where someone else is looking) (Butterworth cited in Anglade et al., 2022), adding cognitive effort and raising worries about distractedness, privacy and what is happening outside of the onscreen frame. At the same time, it can also be hard to know where to look - at the person you're speaking to, who will be on the

screen, or at the camera which is usually above it. Where participants use multiple screens and their camera is not situated on the screen that they are using to look at the interviewer, their attention, while directed at the interviewer, may appear directed elsewhere. Without direct eye contact, it may be harder to decipher emotion (source: consensus conference). It is important to remember, however, that neurodiverse individuals may not be comfortable with eye contact, or, they may look, but only because they are trying to mask symptoms, or are trying to read reactions' (source: consensus conference).

Individual data collection using audio only

Audio only data collection can occur via telephone, video-conferencing platforms (with cameras switched off), or through instant messaging where audio can be recorded asynchronously (e.g. voice notes on WhatsApp or iMessages). It can be used as the primary method of data collection, alongside other data collection methods, or as a 'fall back' method, such as when an internet connection fails. Whilst it has been suggested that telephone calls are becoming increasingly scarce with a quarter of people aged 18 to 34 having never answered their phone (Ball, 2024), and that this causes a 'de-skilling' with this communication medium, for some groups, telephone may be the only secure method available to them.

It has been argued that audio only data collection can result in a loss of circumstantial data as well as visual cues. Not being able to see someone in their natural setting (although this may not be possible with face-to-face data collection either) reduces contextual understanding and richness of data and interpretation:

"[Contrasting remote interviews with a face-to-face encounter] ....it was brilliant. So I went to her house and she showed me her garden, which was her pride and joy. [...] I was sat on her sofa, we had like a, a proper chat. And I got lots more information from that and loads of, 'cause we went to people with a particular disability, got loads of information about how they lived really just from visiting their, their home." (Interview with researcher)

The recording, analysis and reporting of this wider 'contextual data' however, is ethically complex. Participants need to be made aware of what is being 'counted' as research data by the researcher, **MORE INFORMATION** and researchers need to be reflexive about the way they have identified contextual data and their reasons for perceiving them as relevant to the research (source: consensus conference).

As well as researchers losing contextual data from audio-only data collection, participants also lose their view of the researcher, and ability to gauge how their words are 'landing' through the researcher's reactions (Heath et al., 2018). Indeed, body language plays a significant role in communication. Drabble et al (2016) have argued that face-to-face recruitment is of heightened importance when audio-only data collection methods are used, so that participants can build trust. This can be particularly important when researching underserved, stigmatised or hidden populations where trust can be an issue, and the researcher's sincerity may be tested (source: consensus conference).

Rapport development can be more challenging when using audio-only data collection methods (Novick, 2008). Telephone interviews, for example, can be of shorter duration than face-to-face interviews because the researcher is unable to pick up on visual cues and is therefore less likely to probe for specific issues or encourage participation (Irvine et al., 2013). However, more recent research has suggested that rapport can be built in a similar manner to face-to-face or video data collection (Reñosa et al., 2021), although it is harder for the researcher to identify when it has been established (Harvey et al., 2023).

Despite these concerns, audio-only data collection is associated with a range of potential benefits including: potential anonymity for participants, reduced intrusiveness of the research and more equal power relations between the researcher and participant (Trier-Bieniek, 2012). The increased anonymity can make audio-only data collection an attractive option for research with hidden, stigmatised or otherwise marginalised populations (Sturges and Hanrahan, 2004), or for research on sensitive topics (Drabble et al, 2016). Indeed, it has been found that it is easier to narrate difficult experiences when you cannot see the other person, and that this can yield richer descriptive data (Trier-Bieniek, 2012, Ward et al., 2015).

Points to consider if undertaking remote qualitative audio-only interviews with individuals:

1. **Lack of visual cues** may make it more difficult for the researcher to identify which parts of an interview are interesting or 'exciting the participant more than another' and therefore worth pursuing (Interview with researcher). Similarly, without visual cues, the participant may struggle to interpret the researcher's responses, and will likely also be unaware of whether the researcher is taking notes. Note-taking on the part of the researcher can be interpreted by participants as indicating which topics or statements are particularly important, and this can also impact the direction of the interview and data produced (source: consensus conference), shorten the encounter, and reduce the depth and richness of the experience (source: researcher interview).

   Not being able to see the participant can make it harder for the researcher to 'read the situation' or to interpret silence. This can result in the researcher filling the silence prematurely (Hammond, 2018: source: interview with researcher) or potentially misinterpreting the silence, making emotional sensitivity and being able to read distress harder (Epp et al, 2022). However, not being able to see the researcher's reactions to what the participant is saying can make it easier for participants to say things that are hard to say face-to-face, and for stigmatised groups to participate given the increased degree of anonymity (Krouwel et al., 2019, Oates et al., 2022, Jenner & Myers, 2019). MORE INFORMATION

   Lack of visual cues can also contribute to participants 'losing track' or repeating themselves (source: consensus conference). Drabble et al (2016) have suggested that 'supportive vocalisations' (encouraging words and tones) and 'orientating statements' (e.g. how many questions are left, referencing the wider research project to give the participant a sense of where they fit in) can address this issue within audio-only interviews. There can also be benefits of not having visual cues- it removes the need for researchers to visually 'perform' their responses (facial expressions, posture) as well as vocalise them. This may be of value when listening to distressing or sensitive information, as it enables researchers to concentrate on 'active listening' (Drabble et al, 2016) without the pressure, anxiety and/or effort of responding visibly (Sipes et al, 2019). In the absence of visual cues, telephone interviews may also encourage participants and researchers to verbalise elements of bodily experience that are assumed or unspoken when visual cues are present (Enoch et al., 2023).

2. **Inclusivity.** For people who experience difficulties with communication, either through a disability or health condition (e.g. hearing or speech impediment, cerebral palsy, aphasia) or because they do not speak the same language as the researcher, lack of visual cues can be particularly challenging. Accents can be harder to understand without visual cues to support interpretation, and lip reading/live captioning are not possible with telephone interviews. Audio-only data collection, however, can be more inclusive than other remote methods of data collection given the prolific use of mobile phones, and the relatively low costs of providing participants with them, along with data and any required applications, should they not have access (Karadzhov,2020; Singer et al, 2023). Data collection using audio-only smart phones also means that participants (and researchers) are not tethered to a particular place but are instead able to move around during data collection. This flexibility supports the inclusion of participants from hidden, underserved and also transient participant populations (e.g. homeless), as well as those who have significant constraints on their time, e.g. those with caring responsibilities, parents and professionals (Karadzhov,2020; Oltmann, 2016). MORE INFORMATION The flexibility and relative lack of preparation needed to participate in audio-only data collection can also support inclusivity by enabling participants to feel more relaxed (e.g. no need to think about backgrounds, dress or appearance), and an absence of visual cues can also support the inclusion of neurominorities by reducing distraction and anxiety and lessening the cognitive load of 'self-presentation' (Szulc, 2023).

   However, it has also been observed that participants are more likely to be multi-tasking during telephone data collection than other remote methods, which can reduce focus and negatively impact data quality (Ślęzak, 2023). Moreover, the researcher has no control over, or potentially any insight into, the environment the participant is in during data collection, bar any auditory cues (e.g. footsteps, traffic, voices), which can mean contextual data are lost.

Individual data collection using exchange of text

Text interviews can be conducted by email, chat rooms, text messaging (SMS) and/or instant messaging apps. Text-based interviews are increasingly being used by qualitative researchers, facilitated by the rise of various instant messaging applications (e.g. WhatsApp, Facebook Messenger, Slack, SnapChat, Viber, Discord and WeChat). Some of the key benefits of text-based interviews are their reach and flexibility, their heightened potential for anonymity (user profiles can be used in place of names) (Anderson et al, 2021), as well as their ability to be implemented synchronously, asynchronously, or in combination.

When used asynchronously, text-based interviews are arguably the most flexible method available for remote qualitative data collection as participants, and researchers, may respond at a time and place convenient for them, and with as much time as they need to consider their response. As such, text-based interviews typically produce data that are very different in nature (e.g. in terms of fluency and structure) to those generated by synchronous data collection methods. Whilst this can render them easier to read than verbatim transcripts, they are more likely to constitute 'sanitised', edited accounts, rather than spontaneous thought. As James and Busher (2006) note, with email interviews, the questions sent to participants have to be very clear and unambiguous, as participants needing to send clarification questions can lead to the interview becoming protracted and researchers can waste opportunities for data collection. Despite this, however, as noted by Pell et al., 2020), asynchronous text-based methods give participants a chance to 'own' their own accounts, whilst also eliminating transcription costs. This greater agency and control can create more symmetrical power relations (Hanna and Mwale, 2017; Ślęzak, 2023), although it can lead to frustrations on the part of the researcher. One researcher who interviewed young people via WhatsApp messages noted the following,

> ***"In face-to-face interviews, I am used to being able to direct the conversation more overtly, to decide when it begins and ends and to control the pace. In contrast, through digital messaging interviews, I felt myself patiently (and sometimes impatiently) waiting for participants to determine when they wanted to respond as well as being conscious that they could end the interview at any time they chose." (Gibson, 2020: 620)***

It has been acknowledged that it can be more challenging to develop rapport within text-based interviews than for other remote methods given the complete lack of visual, verbal/paraverbal (e.g. laughter, tutting), or audio cues (Harvey et al., 2023). This can mean that less rapport is built (Harvey et al., 2023) or that rapport takes longer to reach the level needed for accessing in-depth data (Gibson, 2020), including for underserved groups (Gibson, 2020, Harvey et al., 2023). Fritz and Vandermause (2018), reflecting on in-depth email interviews, have suggested that use of 'reciprocal language', i.e. using the words that participants use themselves can be validating and support the development of trust and rapport:

> ***"Responding to participants using their chosen 'descriptor words' enhanced communication and subtly provided participants with validation that their words (text-based) were important and were not wrong or a misuse of language. When the same words used by participants were employed, communication was enhanced and credibility given to participants' voices." (Fritz and Vandermause, 2018: 1646)***

In the case of email interviews, researchers may also choose to develop rapport prior to data collection, including synchronous contact and chats as the consent process and email interview gets set up, or by asynchronously emailing respondents with research updates and gentle reminders to encourage them to maintain interest with the study. Indeed, regular online contact can help participants to actively engage with questions (Gibson, 2017b), as well as the way questions are formatted within the email (numbered was found to work better than bullet points) (Fritz and Vandermouse, 2018). Where use of a technology, for example, instant messenger, is already part of daily interactions with others for certain groups (e.g. young people), it can be easier for researchers to build rapport in the same way they would do face-to-face, or using other communication channels (Lannutti, 2017; Gibson, 2020; Singer et al., 2023). However, for some participants, the lack of rapport associated with text-based data collection can be preferred; the participant might have consciously selected this interview channel from a range of others to keep the researcher at 'arm's length' as this enables them to give more honest accounts (Harvey et al., 2023). Remote qualitative data collection creates a personal distance between researcher and participant(s) resulting in more candid accounts of sensitive or stigmatised issues (Van Zeeland et al., 2021, Heath et al., 2018), but making the role of silence harder to navigate (source: consensus conference). Text-based interviews can also be less daunting for inexperienced researchers, particularly if undertaking research on a sensitive topic. They may actually establish rapport more easily by using asynchronous exchange of text as they have longer to consider their responses and prompts (Gibson, 2017b) and can return to the literature in between contact (Dahlin, 2021). Indeed, given the timescales involved in asynchronous remote text-based interviews, which can go on for several months (compared to face-to-face interviews which typically last 60-90 minutes), rapport can be developed over time, as the research becomes interwoven into the participant's life and the researcher becomes witness to unfolding events between points of contact. However, given the extended timeframes, keeping participants engaged can be challenging. Providing timelines for expected responses, rather than leaving this open-ended can help to manage this (source: consensus conference). Increasing the number of questions about a particular concept can also help to bring focus, consolidate thought, deepen engagement and reduce time in the written exchange.

The potential for asynchronous text-based interviews means that researchers can conduct several interviews simultaneously. Indeed, there may be institutional or project timeline pressures to do so. Whilst this con-current interviewing may allow for 'cross-fertilisation' of the interviews, such that ideas elicited from one interview can be fed into subsequent interviews prior to analysis (Dahlin, 2021), it also poses challenges. If several text-based interviews are occurring concurrently, it can be difficult to undertake interim analysis as well as to focus the researcher's attention on any one interview:

> ***"Throughout this process, I found it difficult to manage five separate yet similar conversations concurrently without getting them mixed up. The difficulty arose when constructing response emails. Balancing mindfulness to the specific conversation for which a response was being constructed while keeping in mind the greater concept concurrently being explored with other participants required intense concentration and continuous rereading of email threads. In addition, it was difficult to manage the rhythm and timing of five separate conversations. Individual participants tended to have a rhythmic pattern of response timing to emails inquiries that remained consistent throughout the researcher–participant interaction. Total interview times varied greatly, from 2 days to 2 months, with email exchange times varying from hours to weeks." (Fritz and Vandermause, 2018: 1646)***

Given the range of benefits and challenges associated with text-based interviews, researchers need to consider the following:

1. **Inclusivity** Use of text-based interviews can facilitate inclusivity, for example, when used asynchronously, participants in different time zones can be interviewed without resorting to unsociable hours for data collection (James and Busher, 2006). The greater anonymity that is possible through text-based interviews can also mean that hidden, stigmatised or otherwise marginalised communities can participate. Where messaging apps such as WhatsApp are used to conduct the data collection, researchers have suggested loaning smartphones so that participants do not have to supply their personal phone number (Mavhandu-Mudzusi et al., 2022; Singer et al., 2023).

   Use of visual elicitation (through animations) may be empowering for participants, and facilitate the inclusion of children (Lomax et al., 2022). They can flatten power dynamics, encourage participation and enhance diversity/facilitate inclusion (Fane et al., 2018, Researcher interview). Furthermore, neurodiverse participants, those who have experienced trauma and those with specific health conditions and disabilities that impact communication, may prefer text-based participation. However, it is important to remember that visual materials are not neutral but are instead interpreted in relation to internal (the image's content) and external narratives (the social contexts and relations within which the image is embedded at any moment of viewing) (Banks & Zeitlyn, 2015). Hence, researchers should choose visual material carefully with both the research question, research participant and technology in mind.

These methods rely on literacy, digital skills and access (Chen and Neo, 2019), as well as reasonable typing speed and network availability, all of which can exclude underserved and remote populations. Whilst online translation tools are freely available, such tools are not typically sensitive to cultural idioms, nuances and etiquette which are critical to qualitative research. Researchers should carefully consider the accuracy of translation in text-based data collection and seek translation services where there is a good understanding of local culture and context (Yunus et al., 2022).

2. **Design** Given the time commitment involved in undertaking asynchronous text-based interviews, it is important to consider methods for keeping participants engaged from the outset, as well as having strategies in place for leaving the data collection space. This can be challenging, particularly if the interview is sustained over weeks or months. Researchers who plan to use instant messaging platforms or SMS for text-based interviews should carefully consider the compatibility of the platform, and its features, with the study design, for example whether voice recordings, photos/emoticons are accepted, or if participants should only use the text feature (Singer et al., 2023).

3. **Data** The type of data that text-based interviews produce can be very different to that produced by spoken word, and it is important that researchers consider that they may receive short and superficial, or 'finger peck' responses (Jemielniak, 2020; Fritz and Vandermause, 2018). Chen and Neo (2019), however, suggest that this might depend on the technology used; whilst data generated by instant messaging can be similar to spoken data with a similar back and forth engagement, email interviews tend to present 'fully developed sentence and argument structure'. However, social groups can differ in their use and style of text-based communication mediums. Different written media (e.g. email, WhatsApp, Instant messaging) as well as online communities also come with their own vernacular for communicating emotion and mood (Hammond, 2018); the term 'textese' (Chen and Neo, 2019) has been used to describe the acronyms and shorthand that are adopted across these modalities (e.g. IRL- in real life, IYKYK- if you know, you know). Researcher fluency in this vernacular, sometimes referred to as 'multiliteracies' (Fane et al., 2018) can shape mis/interpretation and data quality (Gibson, 2020). Text-based interviews can also include the use of signs, symbols and interactive features (e.g. emojis, animations, memes, photos, videos, voting systems etc.). These can aid interpretation of the participant's written text in the absence of visual cues, act as prompts or cues, build rapport, assist with the recognition of negative affect (Boutet et al., 2021), as well as facilitate cross-cultural communication (Alshenqeeti, 2016). Use of emojis and reactions such as 'haha' or 'wow' can help to create a comfortable and informal online setting that seems natural to the participant, and can take the place of verbal cues. However, their use has also been found to generate ambiguity in communication (Kimura-Thollander and Kumar, 2019, Bresciani and Eppler, 2015), given that it is not always clear how emojis are interpreted by others. Moreover, it is easy to accidentally select a different emoji than the one intended, and there remains uncertainty around how they can be incorporated meaningfully into qualitative analyses.

   Furthermore, whilst researchers might design a study to use text-only methods of interview, there can sometimes be slippage between text-based and audio-only interviews, as participants can choose to use the 'voice memos' function of instant messaging apps instead of typing their response, particularly if they are providing a long and complex answer (Mavhandu-Mudzusi et al., 2022). Researchers need to consider in advance how these will be handled. Whilst

Mavhandu-Mudzusi et al. (2022) found that they contained richer data than the typed responses, some researchers opted to exclude them in analysis (Henry et al., 2016). Finally, researchers must consider the security of the data they generate. Whilst end-to-end encryption is used by platforms such as WhatsApp, this does not guarantee data security, or prevent infiltration of interview spaces by imposters (Manji et al., 2021), researchers are therefore encouraged to thoroughly explore the data security features of the technology or platform they intend to use in relation to the population they are researching, as some are more vulnerable to breaches of data security than others (Barbosa and Milan, 2019).

MORE INFORMATION

Group data collection (e.g. focus groups and group interviews)

Group data collection primarily occurs through focus groups or group interviews. They can be carried out in a variety of ways remotely, synchronously or asynchronously, and using different technologies and platforms - video-conferencing (audio and visual), text-based methods (text only but may involve some audio) or audio-only (including video-conferencing with cameras off). It has been suggested that the researcher has to 'work harder' in group data collection when conducted remotely due to hampered abilities to 'read the room', leading to recommendations to reduce the number of participants to no more than five (Bolin et al., 2023), especially if technology needs to be checked at the start as a problem with one person's access can delay the whole group.

Specific considerations for each method are presented below:

Group Data Collecting Using Video-conferencing Platforms (Cameras on or off)

When conducting focus groups or group interviews using video-conferencing platforms, allocated time, and ideally dedicated staff members, should be on hand to ensure that the IT is working correctly for each participant (and they feel able to use it) before data collection begins. Ideally this will occur in advance of the data collection event, but there will nevertheless need to be technology checks 'on the day' regardless. MORE INFORMATION Etiquette for the group (e.g. whether to raise hand when wanting to speak, or just speak, who is visible to who), and whether or not the chat function will be used, need to be made clear to the participants from the outset. Turn taking can be harder to implement remotely, and there can be more interruptions than would occur in a face-to-face setting. In order to avoid 'zoom bombing' (uninvited participants infiltrating the group, in this instance, virtually), researchers can 'lock' the session, and this can also be reduced by providing a password to enter the space, and/or the use of a virtual 'waiting room' or 'lobby' where identity can be established before entry is permitted.

In audio-visual groups where the participants are strangers to each other before the data collection, rapport can take longer to build remotely than face-to-face. This could shorten the time available for data collection and should be accounted for when planning remote focus groups or interviews (Bolin et al., 2023). Where participants have pre-existing relationships with each other, rapport can build more quickly (Boland et al., 2022, Bolin et al., 2023), although prior relationships can also sometimes reduce participation and engagement e.g. if the participants belong to the same community and there is fear of their views being reported back. Indeed, Jenner and Myers (2019) found that the depth of disclosure by a participant is not linked to the channel of data collection per se, but to whether the researcher and the participant's social networks might overlap – potential overlaps tending to reduce the depth of data produced (Jenner and Myers, 2019). Overall, it is important to bear in mind that anonymity is considerably reduced in focus groups and group interviews, and there are greater risks to confidentiality and privacy.

If the focus group or group interview is set up to use audio and visual data, this works best if every participant has their cameras switched on (Marhefka et al., 2020). In such groups where some participants turn their cameras off, but others have theirs on, those with cameras turned on can feel more exposed as the sharing of (visual) data is uneven and they may feel uncertain about who exactly they are talking to. There may be concerns that the participant with their camera off is a non-genuine participant (source: consensus conference). Concerns about who else might be in the group - who they cannot see - may be particularly heightened for participants who have experienced trauma, MORE INFORMATION and/or underserved social groups where mistrust is prevalent (Wellings et al., 2000). Careful facilitation is required in these circumstances, and if researchers decide that having cameras on is key to data collection, this should be made very clear at the point of recruitment to the study and re-iterated during consent (source: consensus conference). Thought will also need to be given to the fact that not all participants will have good quality web-cams capable of transmitting a clear picture, and the steady internet connection that group data collection with cameras on requires (Hensen et al., 2021). It may also not be possible to predict these barriers to participation (e.g. service outages). However, the potential impact of 'technology deprivation' needs carefully considering at the research design phase, as it is mostly likely to exclude underserved and/or marginalised communities (source: consensus conference). **MORE INFORMATION** Providing technologies (Singer et al., 2023) may help overcome these technological challenges, but will not overcome the barriers of digital skills.

Having cameras off and relying solely on audio data in remote focus groups can sometimes be advantageous, and reduce bandwidth demands for those with slower/less reliable internet speeds and connectivity. Turning off the camera may also reduce self-consciousness and improve participation:

> ***"When I had my video on [in a remote focus group discussion], I barely talked. I was just ... it felt like a load of people were looking at me, and so I felt the need to turn it off, to be able to talk comfortably." (Interview with research participant)***

Indeed, participants in video conferencing with a group may feel subjected to a 'hyper gaze from a grid of staring faces' (Fauville et al., 2021a). Some people find this uncomfortable. Feeling scrutinised by others may contribute to Zoom fatigue and limit the level and duration of engagement online.

Whether or not the chat function is on during data collection can also be a significant influence on the data. It can be useful for asking questions without disrupting flow, and gives participants non-threatening spaces to ask clarifying questions. Using the chat is an important aspect of inclusivity (Chen and Neo, 2019), however it may not work as well for participants who find multiple streams of data overwhelming. **MORE INFORMATION** Through some platforms, participants are able to see expressions or representations of self and others in the form of visual signs and symbols such as avatars or emojis. These constitute both data and commentary on the data as it unfolds. Visual prompts and communication may encourage participation and enhance shared understanding (between participants in groups or with researcher), and participants can make contributions that they would have felt uncomfortable saying out loud. The availability of time tracking monitors can also allow the researcher to check each participant's speaking time, and number of times they contributed to the discussion, which can highlight participants who may be experiencing barriers to participation which can increase inclusivity (Flayelle et al., 2022). With particular platforms, participants and researchers can also use the chat function to pass private messages to each other which can help the researchers run the group more effectively, and allow participants to share information with the researcher that they do not want to share with the group (Flayelle et al., 2022). It also means that researchers can privately 'check in' with participants who appear less engaged or distressed. Similarly, direct messaging can enable researchers to privately communicate with each other, or participants with interpreters, during data collection. This can support the creation of supportive spaces and ensure that no one's voice is missed (Flayelle et al., 2022; Dodds & Hess, 2020), but also requires additional resources.

However, some participants find the possibility of three streams of communication (audio, visual, text) overwhelming, and this stress can affect the participant's ability to provide data (Sweller, 2011). Indeed, it's also possible that chat functions can be used to harass, threaten or intimidate other participants (source: consensus conference). **MORE INFORMATION** Having a dedicated facilitator or researcher on hand to manage the chat and admit/remove/mute participants as well as identify signs of distress can help to mitigate some of these potential harms (Dos Santos Marques et al., 2021), however there are challenges to identifying distress in these contexts. With larger groups, not being able to see everyone's face on the screen at the same time can make responding to visual cues harder (Epp et al, 2022). **MORE INFORMATION** Remote focus groups and group interviews have relatively easy routes of rapid exit compared to their face-to-face counterparts (often the click of a button), which can support the inclusion of groups who would find face-to-face scenarios intimidating or distressing, but they can also make it hard for researchers to distinguish between those leaving due to distress, and those leaving due to technology issues (Epp et al, 2022). Follow-ups or safeguarding concerns are also harder to pursue, particularly where participants have opted to remain anonymous. MORE INFORMATION

Through some platforms, auto transcription is available. This may contribute to rapport and instant reflection as the event unfolds in real time. It may enable a more democratic co-production of the data. It may prompt clarification, corrective editing or self-censorship, but can also support the inclusion of those with hearing impairments.

Audio-only focus groups or group interviews are inherently more challenging than remote video sessions; it is difficult to tell when participants are speaking but muted, to identify an individual speaker among many participants (which can also make transcription more resource intensive), and to interpret tone and body language. In addition, audio-only encounters often limit crosstalk, which can enhance the depth of responses. Participants can also forget who is in the virtual room if a person is not contributing, and multi-tasking occurs more frequently in audio-only data collection.

Group data collection using exchange of text

Text based focus groups and group interviews bring with them the opportunity for using synchronous or asynchronous mediums (e.g. WhatsApp or email), and can lead to more democratic power relations between researcher and participants. The lack of in-person relationship can mean that power structures are not as concretely put into place. In WhatsApp focus groups, for example, participants have as much power to speak up as researchers and have as much control to shift the flow of conversation (Neo et al., 2022). When running synchronous text-based focus group discussions (e.g. WhatsApp or instant messaging) facilitators may need to carefully balance 'listening responses' that keep the conversation going (written and emoji cues) with enough silence to avoid interrupting the conversational flow (Colom, 2021). Having the questions visible from the onset results in better rapport (Hallam, 2022). Two active participants can also act as ice-breakers; their chat encourages others to join in, as the prompts of the researcher do not always have the same level of effect as a participant. It is therefore important to have a sufficient number of participants to increase the chances of having some participants in the group who take this active role (Hallam, 2022).

Text-based data collection methods obviate transcription costs and afford participants much greater levels of anonymity than other methods (Ślęzak, 2023), which make them an attractive option when conducting research with hidden populations. However, participants who are regular users of the technology being used for the data collection might need to consider what information they have made available on the platform- e.g. a WhatsApp or Facebook account showing the participant's phone number, photographs and/or personal details. MORE INFORMATION It has been suggested that providing devices with the platform already installed so that participants can set up new profiles not linked to their accounts can afford them greater privacy (Singer et al., 2023).

One of the key challenges of text-based group data collection is keeping the group engaged and on topic, particularly if the data collection is asynchronous and there are long gaps between responses. The use of platforms that show conversation 'threads' i.e. what previous text a participant is responding to can support the flow of the data collection, however these cannot easily be saved and present challenges for analysis.

Inclusivity is an important consideration for all forms of remote focus groups or group interviews, and there will be unique considerations for each population. Indeed, there is evidence that dissent is more likely to be expressed in text-based focus groups compared to those conducted in-person or with video-on synchronous data collection methods, with increased anonymity perhaps leading to greater freedom of expression (Namey et al, 2021). This has been referred to as the 'disinhibition effect' and has been linked to the removal of visual cues (Montoya-Weiss et al, 1998).

Emerging Remote Methods

Whilst the use of interviews and focus groups in remote contexts has been more widely used and reported, the evidence base for other qualitative methodologies is still emerging, as discussed below.

Remote observation in ethnography

Observation is regarded as a key aspect of ethnographic research, however there is only a small amount of published evidence on the use of remote methods to conduct it (Hall et al, 2021), and much

of this is in the form of commentaries, or involves 'found' data (Mare, 2017), what Posthill & Pink (2012) refer to as 'social media' ethnography, or 'digital ethnography' (Forberg & Schilt, 2023).
Given that ethnography relies heavily on (often long term) immersion in the field, using a range of approaches, the COVID pandemic had a big impact on how ethnography could be conducted, and many researchers were forced to move to online platforms. For these types of studies, which were well developed before COVID-19, researchers may follow 'internet events', including '…monitoring profile pages, hashtags, group discussion threads and trending topics' (Mare, 2017: 2). Research by Howlett (2021) argued 'being there' during ethnography was seen as key before the pandemic, however, 'being there' can be interpreted in different ways, and may include 'mental access' to participants' worlds (Mare, 2017: 652). Indeed, there is now an argument that says you do not need to be physically present to observe people (Podjed, 2021). In an opinion piece, Boughton (2020) argues that:

> ***"Thanks to smartphones and tasks such as video diaries and photo uploads, researchers can now peek into the lives of respondents without physically needing to be there. It's easier than ever to capture and assess behaviours and reactions as they happen, delivering true to life data quicker and easier. We'll set out tasks to see how users perform certain actions - get them to film themselves in their environment, show us around where they live, take photos of the tools they use and everyday parts of their lives." (Boughton, 2020)***

MORE INFORMATION

Now that so much of our lives are reflected and memorialised on digital platforms, opportunities to do this type of research have increased (Howlett, 2021), and more symmetrical relationships between participants and researcher may now be possible, given that participants can look up researchers' social media presence (Begueria & Beneito-Montagutl (2024), and researchers can now glimpse into participants' lives from afar. Indeed, Begueria & Beneito-Montagutl (2024) noted that in their study, the ethnographer and participants had equal access to each other's social media accounts. They were connected using a range of technologies- smart phone, laptop and tablet, and through multiple social media accounts (Facebook, Twitter, Instagram, WhatsApp and more). They found that the ethnographer was as much observed as those being observed, and also that boundaries between the professional and personal life of the ethnographer were challenged (e.g. some participants posted significant amounts on the ethnographer's personal Facebook account). Reflecting on this, they observe that invasion of personal digital spaces can be experienced as similarly intrusive as invasion of personal physical space, concluding that positionality is a key consideration for researchers wishing to conduct this type of observation.

As well as observation of digital environments, ethnographers wishing to conduct remote observations of face-to-face environments have similarly had to adapt their data collection methods. These adaptations have included the use of Google Maps street view to explore participants' localities (Reimer-Kirkham et al, 2024), photo elicitation methods (Sinko et al, 2020; Bakare & James, 2022) as well as WhatsApp instant messaging (Humphries et al, 2022). Humphries et al (2022), who had to adapt their observations of healthcare professionals due to the COVID-19 pandemic, refer to this approach as Mobile Instant Messaging Ethnography (MIME). This near synchronous method had the advantage of enabling the researcher to feel close to the action, without being as intrusive as face-to-face observation; however, rich contextual data can be missed (Humphries et al, 2022).

A variety of tools have emerged in recent years to support remote ethnography (Schneer, 2020), including apps (e.g. OverTheShoulder) and software (e.g. itracks which supports unobstrusive observation of remote interactions).

Creative Methodologies

Remote technologies provide new avenues for data collection and, as such, new opportunities for creativity. Emerging methods include use of a whiteboard feature for drawing (Spray et al., 2022). 'Enhanced' interviews or focus groups that use visual methods or object elicitation can be adapted to the online context; for example, using digital stimuli (Kara, 2020). Lomax et al. (2020), created a series of digital animations that acted as prompts for children to communicate what life was like for them in the COVID-19 pandemic. The animations also illustrated some of the creative methods children might want to use. MORE INFORMATION Creative remote data collection methods can involve additional costs, however, and researchers need to consider whether these will end up being transferred to participants. To support inclusive research MORE INFORMATION, materials for creative tasks can be posted or otherwise supplied to participants in advance of a remote creative workshop. For example, Fleetwood-Smith (2021) developed an online collage activity that required adult participants to reimagine the hospital and, in preparation, sent co-produced 'remote research kits' in the post consisting of collage materials and instructions. Spray et al. (2022) also provided simple materials for sculpting (pipe cleaners, play doh and balloons), as well as an iPad, in order to remotely collect data with children during the pandemic about the experience of having asthma. Boardman et al. (2023) similarly supplied 'take home' art boxes to children through a local art gallery, inviting them to make creations that reflected their identities, as part of a project evaluating public engagement with research on genetic screening. Participants were invited to submit photographs of their artwork or return their creations to the gallery for display. The children's creations were then analysed as data in an evaluation of a research-based art installation. Remote creative methodologies can produce data types that are not typical for qualitative research, and researchers need to consider how this will impact analysis. For example, remotely-enabled visual/text data forms, such as emojis and animations, will need consideration in terms of how transcription and analysis should be managed (source: researcher interview with researcher).

Summary

Informal exchanges between researcher and participant prior to remote data collection can help develop rapport but need to be planned. MORE INFORMATION During data collection, gaining sufficient rapport demands the researcher's active attention, arguably more so than when face-to-face.

Individual interviews undertaken via video-conferencing platforms are most similar to those undertaken face-to-face. However, engaging this way can be cognitively and emotionally burdensome for research participants and researchers themselves. The researcher needs to think through how this burden will impact different participant groups in advance, depending on their needs, as well as how the researcher will manage their own cognitive burden. When video-conferencing, participants have the power to decide what is visible, or not, to the researcher as they can switch off their camera. Audio-only interviews are less intrusive and can provide greater anonymity for participants than video-conferencing; however, there are no visual cues which can make interviewing, and identifying distress, harder. Individual interviews using exchange of text provides flexibility and anonymity for participants, and the researcher has little influence on how they respond. Text exchange can be particularly good for research on sensitive or stigmatised topics, but can be hard to do, however, particularly in terms of developing rapport, composing questions and prompts that avoid misunderstanding, and managing several concurrent interviews and threads (Humphries et al., 2022).

Remote group data collection such as focus groups and interviews require planning for a manageable size. Technical checks with each participant prior to the focus group are particularly important. At recruitment, expectations need to be made clear such as whether cameras will be on or off, and use of chat functions along with guidance of how individuals protect their privacy. For some research topics and participants, audio-only may enable greater participant engagement, whereas for others, lack of visuals can be experienced as threatening. Early engagement with participants to balance and manage these, potentially conflicting, needs is particularly important for group data collection. MORE INFORMATION Use of chat can enhance data collection, but can also be disruptive or overwhelming, so how it is used needs careful thought. This might include allocation of a research team member to manage the chat. The researcher needs a plan for how to manage sudden participant departure, including how to check on the wellbeing of the departee. This might include the creation of a distress protocol. Text-based focus groups can offer great anonymity if set up to prevent identification of the participant. This can potentially result in greater disclosure from participants, however follow-up, managing distress and managing the (a)synchronicity of the focus group can be challenging if participants take differing lengths of time to respond. Participants can engage more, however, if they are able to view the whole thread of the discussion.

The use of digital platforms for communication and sharing of experience in everyday life provides opportunity for digital ethnography. This can be supplemented with researcher prompted collection of observation data by research participants, such as videos of their environment. MORE INFORMATION Researchers need to consider the level of intrusion perceived by participants, and the boundary between their own personal and professional digital presence.

Digital data collection can also include engaging participants in creative tasks, either digitally (e.g. using photography) or using materials physically distributed to participants (e.g. collage materials). The researcher needs to consider what value this adds to the data, how the creative outputs are included in analysis and any additional costs to the participants.

Researcher Prompts:

1. **What is the role of rapport in data collection for your research topic and participants; how will you adjust data collection to achieve sufficient rapport?**
2. **How will you perform as a researcher; how will this play out using different data collection modalities, and how burdensome will this be?**
3. **How will your participants 'perform;' how will they control their performance in different modalities, and how burdensome will this be?**
4. **How will you enable participants to control the level of intrusion they experience during data collection; and how do you manage intrusion for yourself?**
5. **How will you ensure that your use of a modality does not result in excessive emotional and cognitive burden for participants and for yourself?**
6. **What is likely impact of anonymity (or not) for your participants on your data collection?**
7. **Where participants use a range of data collection modalities and/or the data includes novel forms of data (e.g. emojis) how will you deal with this during analysis**

Section 6: Ethics of Remote Qualitative Data Collection

Ethical considerations in remote qualitative data collection can differ to those when the data are collected face-to-face; they can be amplified, reduced or increased in number. Indeed, many factors surrounding the collection of data that were previously within the remit of the researcher (the physical location of the data collection, who is present etc.) now fall to the participant to manage. This seeming transference of ethical responsibility for key factors in the research process, such as privacy, warrants careful consideration both before and during the research encounter(s).

Control and Autonomy in Remote Data Collection

The operation of power influences the collection of remote qualitative data in a myriad of ways. The researcher has traditionally been understood as wielding power over research participants, who, through being asked to disclose personal details, are in a more vulnerable position. In turn, however, researchers are themselves also beholden to (often invisible) power structures, framed by finances and research governance. What funding a researcher has access to, and how those funds are to be spent, is often bound by the regulations of institutions and funding bodies (Dahya et al, 2023). This can in turn restrict the research design and process, and remote research can be associated with particular costs beyond those incurred within face-to-face research, such as the purchase of technology (e.g. mobile phones, data plans).

These power hierarchies can be linked to differentials in socioeconomic status, health status, educational or professional backgrounds, gender, age, disability, sexual orientation and also the ethnic identities of the parties involved (Prior and Lachover, 2023). Certain characteristics matter more in some contexts than in others, and the same social position can be both powerful and powerless in different data collection contexts (Vähäsantanen and Saarinen, 2013). Indeed, participants with stigmatised or marginalised identities and underserved populations may be particularly sensitive to the consequences of differences in power.

Remote data collection changes how participants and researchers interact and who has control of the data collection environment. This can impact the data collection in both positive and negative ways. It has been noted for example that remote methods can give participants greater power - one study, for example, found it hard to engage adolescents remotely as they would often "walk away during the session, turn off their video, or respond to the moderator's verbal questions in the chat" (Hanna and Mwale, 2017). Whilst potentially hampering data collection, having the autonomy to be able to do this can be empowering for the participants (Jackson et al., 2023). Indeed, participants in James and Busher's (2006) study, which used email interviews, were able to not only control the direction and focus of the interview (which can be particularly challenging for researchers to manage asynchronously), but also the length of the interview:

> ***"Interviews that had been scheduled by the researchers to take a matter of two to three weeks eventually extended in many cases over several months, because this speed of responses suited participants in the busy press of their daily lives. The medium of email allowed them this control over the research dialogues. It slowed up the whole research process considerably, despite many requests from the researchers in the early phases of the interviews for participants to respond within three working days." (James and Busher, 2006: 414).***

For remote methods where visual data are removed (e.g. telephone), participants are also better able to control how and whether their emotional responses are shared with the researcher, as well as how much information is 'incoming' from the researcher. For participants who are neurodiverse, the removal of this dimension can be experienced as a relief (Asan and Montague, 2014, Yuruki and Inoue, 2023).

Power, Identity and Presentation of Self

Face-to-face interviews can feel intrusive and intimidating, whether the participant has to enter the researcher's space, or vice versa (Braun et al, 2017). Participants may not want the researcher to see their living circumstances (source: interview with researcher; consensus conference in relation to underserved populations), or feel that having a researcher come to their home means they have to tidy up and 'host' them (e.g. provide food and drink), which can be burdensome, particularly for those with poor health or disabilities.

Remote data collection can balance this out somewhat, as the participant is in a private place of their own choosing, inaccessible to the researcher, with autonomy to reveal or conceal as much of that space as they want to (Hanna and Mwale, 2017). As such, remote interviews have the potential to tip the balance of power in favour of the participant by affording them more decision-making opportunities (Piacentini et al., 2022). Participants are free to 'take control of the conditions' of the data collection in various ways, for example, in the case of video-conferencing, by deciding where to locate a camera, how to appear within the frame, whether/when to turn it on, as well as whether or not to use blurred or virtual backgrounds (Sipes et al, 2019; Prior and Lachover, 2023, Ślęzak, 2023; Carter et al., 2021c). As Engward et al. (2022) note, 'What is viewed and accessed by the researcher on screen is determined by the participant, while the wider inhabited domain remains concealed.' (Engward et al, 2021: 2)

With cameras off, the perceived burden of 'self-presentation' may be entirely removed (Szulc, 2022). Whilst potentially disconcerting for the researcher, (Valdez and Gubrium, 2020) this absent, incomplete and/or heavily curated view of the participant can be empowering for them as they have the control to manage the way they appear, which can be particularly empowering for those with stigmatised or marginalised identities (Ślęzak, 2023). Disabled people, for example, may be able to conceal their disability in remote interviews and therefore limit how much information the interviewer has about it. Similarly, these options can also be utilised by disabled researchers (Brown and Boardman, 2011), or researchers who wish to conceal other aspects of their identity, such as age or ethnicity, as one researcher commented regarding interviews with young people:

> ***"I had not given participants any information about myself beyond the formal information required for the research information sheets, and for the most part, the absence of verbal and visual cues seemed to minimise the age difference between me and my participants... [...]... One participant finally asked me if I minded if he asked me what 'age range' I was in. I found myself hesitating before I texted back that I was in my fifties, suddenly conscious that he might believe me to be younger than this. The awkwardness of this moment underlined the potential of this interview method to obscure differences between the participant and researcher in ways that can be considered helpful as well as deceptive" (Gibson, 2020: 622-623).***

Whilst some researchers argue that finding shared characteristics between participants can help build rapport, especially in remote contexts where this is harder won (O'Conner and Madge, 2017; Brown & Boardman, 2011), being an 'outsider' in remote data collection has also been found to conversely invite more detailed responses and reduce bias (Asselin, 2003), as more explanation is deemed necessary by the participant (Dahlin, 2021) and the researcher is more likely to ask clarifying questions (Dwyer & Buckle, 2009). However, as noted by one of our consensus conference participants, this detailed explanation can be experienced as burdensome, and this burden disproportionately falls on people from marginalised communities or backgrounds:

> ***"...I personally would probably assume that the researcher's culture was not the same as mine (statistics show there are less African Caribbean heritage researchers accessing research funding), and...this may alter communication accordingly. There may be cultural nuances that I would feel wouldn't be understood, and [I] would have to go through a process of explaining and often this feels like an extra burden.. [...]...I may just decide not to share.." (Consensus conference participant)***

This demonstrates the salience of bodily signifiers in qualitative research, and a decision to remove them through use of an audio/text only technology on either side of the research exchange- researcher or participant- needs to be considered in terms of its impacts on inclusivity and representation.

Privacy and Anonymity in Remote Data Collection

Ensuring the privacy, and (where appropriate) anonymity of research participants, is an important aspect of qualitative research. Indeed, it has been suggested that capacity for privacy is more important for participation and disclosure in qualitative research than whether the method is remote or not. (source: consensus conference) MORE INFORMATION Due to the richness and depth of data usually aspired to within qualitative research, both privacy and anonymity can be challenging. Remote methods, however, offer opportunities to enhance privacy and anonymity not possible in face-to-face research, as well as introducing additional risks.

As the use of remote methods often involve the researcher handing some degree of control over the management of the research space to participants, factors that the researcher would ordinarily attempt to minimise in face-to-face research, such as background noise and distractions (which can affect audio quality) as well as disruptions caused by the data collecting technology itself e.g. poor internet connectivity, become beyond the reach of the researcher (Engward et al., 2022, Oliffe et al., 2021, Deakin and Wakefield, 2014, Goh and Binte Rafie, 2023). Furthermore, the presence of third parties in the research space (known or unknown) - sometimes referred to as 'Zoom bombers' (Boland et al., 2022a) - can sometimes 'hijack' or derail data collection (Prior and Lachover, 2023; Chiumento et al., 2018). These interruptions can lead to researchers misinterpreting visual cues, such as smiles or turning of heads, which could be non-verbal cues relating to the conversation, or a response to the presence of others in the room (Seitz, 2016). Anticipating, and planning for, distractions when creating the topic guide and time allowed has been suggested by Gray et al (2020) as a means of managing these scenarios. When Zoom bombers are children, however, there can be both privacy and distress concerns When Zoom bombers are children, there can be both privacy and distress concerns, particularly if the content of the data collection is inappropriate for a child to hear (Newman et al., 2021). Offering funding for childcare during the research encounter can somewhat reduce these situations, however it is not always a feasible option (e.g. child with separation anxiety, data collection occurring at an unsociable time). Indeed, researchers may feel disempowered to police the boundaries of the research space and request that these 'interlopers' leave (even when/if they notice the data quality is being altered by their presence). This is particularly difficult when the 'research space' is the interloper's own home. Those in shared accommodation in particular may struggle to find a suitably private space to participate in research (Singh et al., 2021, Hernández, 2014, Marhefka et al., 2020). Whilst remote research conducted with children has been found to work best when parents are not in the same room as the child (source: interview with researcher), this might not be possible in all scenarios, and researchers may not even be aware that additional people are present, due to their heavily restricted view of the participant. For sensitive research topics, this lack of control of who overhears the participant, or who sees their screen (Gibson, 2020) can be particularly challenging (source: researcher interview).

For participants in conflict-affected locations where there is a high degree of political surveillance (Douedari et al, 2021), in precarious home situations, or those where coercive control, surveillance or domestic violence are a concern (Little 2017), the methods for remote data collection and maintenance of privacy and confidentiality have to be carefully considered. The remote nature of research may actually heighten participant concerns about surveillance due to the potential for infiltration or interception of data through hacking (Oltmann, 2016). Indeed, email is often considered to be particularly insecure (Fritz and Vandermause, 2018). Methods that require use of a stationed technology might also mean participants having to participate within an unsafe environment, bringing risks to personal safety, reducing the chances that they will agree to take part at all, or restricting how much information they can safely share (Newman et al., 2021; Little, 2017). Such participants may prefer telephone interviews to online interviews due to the difficulty in finding a private space in the home (Pedersen et al., 2023) and in these scenarios researchers should not mail consent forms and information sheets to the home, but instead provide them digitally. Participants may also need specific instructions about how to stop/pause the interview if they are interrupted. MORE INFORMATION There are reported instances, however, of when the presence of 'interlopers' can enhance data interpretation; who the interlopers are, and how they affect the data may actually provide insight into the subject being researched (Prior and Lachover, 2023).

Researchers should consider the privacy and anonymity of participants at all stages of the research design. Whilst the privacy of the research space may not be within the researcher's power to maintain, there are factors that can be considered to allow participants the opportunity to maintain privacy and anonymity:

1. **Supporting participants to access technologies for data collection that afford them as much privacy and anonymity as required.** Video conferencing platforms may be considered more private than telephone because although we are used to giving out our email addresses, a telephone interview usually means the participant giving out their personal phone number (Sipes et al., 2019). However, participants sometimes prefer to use technologies that may have lower privacy standards than those approved by ethics committees or institutions. MORE INFORMATION Researchers should, where possible, avoid paternalism by insisting on use of particular technologies, although it may be appropriate to alert participants to any threats to anonymity and privacy associated with their chosen technology, as well as consider the requirements of their funder, institution and ethics committee.

2. **Supporting participants to choose a time or date for their data collection when they will have greatest privacy** in the location the data collection will occur and providing them with the means to end data collection abruptly if needed (Hanna, 2012), this might include having a 'code word' to signal that privacy has been breached (Peterman et al, 2020).This also needs to be considered for asynchronous methods such as email and instant messaging, as the participant's screen may be visible to others (Gibson, 2020).

3. Whilst the flexibility and choice made possible by remote research may offer new possibilities for inclusivity and access, it is important to consider how privacy concerns can be increased for **participants for whom engagement in research is always mediated by others**, e.g. carers or interpreters (particularly if this person is a family member, friend or community member known to the participant outside of the research encounter). It also affects those who do not have independent access to technology, or do not own their own devices. Indeed, privacy will likely look very different for these groups as Mikulak et al (2022) note:

> ***"While the digital gap might be narrowing for people with learning disabilities, for many access to technology remains mediated through family and support workers. This was true for many of our participants who were reliant on support staff to facilitate access to technology and/or a particular platform. Some participants did not have their own devices and needed a staff member with access to a laptop to be on shift. Others had their own device but were not comfortable using it independently, especially when using an unfamiliar platform such as Zoom." (Mikulak et al., 2022: 275).***

Where a participant's inclusion in the research hinges on the involvement of another person, researchers should be alert to any signs of coercive control (e.g. speaking on behalf of participant, controlling the topics discussed) as there might be implications for safeguarding (source: consensus conference). Researchers should also be mindful of different cultural interpretations of 'privacy', as for some social groups, having a family member present would still be regarded as a private space (source: consensus conference).

Communicating these known limitations to privacy in a way that is accessible for the social groups to which they apply, as well as working with participants and intermediaries to co-develop methods to enhance privacy as far as possible is key to inclusive research practice.

4. **Anticipating, and informing, participants of any known risks to their privacy, anonymity and data security**, particularly those they may not have considered, as well as being alert to any emerging risks, is of critical importance. For example, in the context of group data collection, informing participants of any contact details,

profile pictures, bios or linked accounts that will become visible to others in a group setting (Douglas et al, 2021). Newman et al (2021) suggest that participants in remote focus groups should be encouraged to adopt nicknames or pseudonyms and, for video-conferencing contexts, to use virtual backgrounds to heighten their privacy. Similarly, if the research is to be conducted by people who are known to the participant or have a duty of care towards them (e.g. a health care professional, social worker, teacher) participants need to be made aware of this before recruitment into the study, and any implications for them explicitly highlighted.

5. **Those unfamiliar with the technology are at greatest risk of inadvertently sharing more information than they intended, including identifiable data or sensitive viewpoints/experiences**. Scenarios can include: participants not realising, or forgetting, when a microphone or camera is on/off, assuming another participant in a focus group cannot see them if that participant's camera is switched off but theirs is on, posting a comment to the whole focus group when the message was intended for the researcher alone). **Researchers should be wary of 'offloading' the work and ethical imperative of data security onto their participants**. Indeed, access to the digital world should not be conflated with digital skills to safely and securely participate in remote research (Engward et al., 2022). Young people, for example, have been found to be more 'savvy' about protecting their online privacy than older generations (Bolin et al., 2023). MORE INFORMATION Risks can be managed by determining what personal information could be visible to others through data collection, and supporting participants to remove, reduce or disguise their personal information where appropriate, for example, by using an alias, avatars (Gadalla et al, 2015), masks or blurred photos (rather than live images), or an account set up specifically for the research (Cook, 2012). This can make the research more appealing and safer for participants who belong to 'hidden' populations (e.g. those engaged in illegal activity), but can also reduce trust on both sides of the research exchange (Teubner and Flath, 2019; source: consensus conference; interviews). To avoid paternalism, **decisions to use these strategies should not be imposed onto participants, but instead should be facilitated by discussion with the researcher**. Researchers may face scenarios where data management plans and ethical approvals are in conflict with the wishes of participants (e.g. a participant wanting to use a personal account for data collection rather than setting up an anonymous one), and researchers should anticipate where these tensions are likely to occur and how data management strategies can flex around participant preferences, and situations where they cannot.

6. **Video-conferencing platforms, when used for voice only, or text-based methods using non-personal accounts, can afford participants the greatest levels of anonymity and privacy in remote qualitative research** because they can be undertaken without links to email accounts or profiles, and don't involve giving a personal phone number out to a researcher or other participants (Sipes et al, 2019; Ślęzak, 2023). Furthermore, certain video-conferencing platforms, as well as instant messaging and email platforms allow the participant to block the researcher following data collection to ensure that there is no further contact (Sipes et al, 2019). As noted by Carter et al. (2021c), there are particular topics and populations where anonymity and privacy are essential for participation, for example marginalised, stigmatised or underserved groups (Piacentini et al., 2022; Lathen and Laestadius, 2021), or where the researcher has a pre-existing relationship or duty of care in relation to their own participants, for example, health care professionals researching their own clinical practice (source: consensus conference). MORE INFORMATION

7. **Where levels of privacy and anonymity are greater, participants may feel more able to report more sensitive or stigmatised experiences and discuss less socially acceptable feelings**, as noted by Jenner & Myers (2019):

> ***"'Exceptional disclosures'…only ever occurred in private, most commonly via Skype, and covered such sensitive topics as unprotected sex, miscarriages, abortions, postpartum depression, and arrests." (Jenner & Myers, 2019: 173)***

Researchers should consider the tensions between a potential increase in 'exceptional disclosures' when greater anonymity is possible for participants, as well as the ways that heightened anonymity can preclude the effective implementation of safeguarding measures. A lack of safeguarding procedures can have serious implications for participant and researcher not only in terms of safety, but also psychological distress. MORE INFORMATION

8. **It is important that privacy and anonymity are sufficiently considered through to the post data collection stage of the research.** The researcher will be powerless to prevent participants using details gathered through the data collection (e.g. phone numbers) for example in the case of WhatsApp group chats to send unsolicited messages to other participants unless this is managed before data collection (Neo et al., 2022). There is also an additional risk of unauthorised recordings being made that are beyond the control of the researcher (source: consensus conference). These can be more easily generated in remote contexts: for example, in instances where the researcher does not have full sight of the participants (so would not see recordings being made) (Boland et al., 2022a), where it is possible to take screenshots of information or images (Neo et al., 2022), and if recording links are accessible on video-conferencing platforms after the data collection event has ended. Whilst some risks to privacy and data security are more easily managed than others, the importance of privacy and respect for data security should be emphasised to participants in group data collection scenarios. However, the implications for trust (both between participants themselves as well as between participants and the researcher) and disclosure need to be weighed against data security and privacy concerns (Teubner and Flath, 2019).

9. **Researchers should consider providing participants with a password-protected electronic invitation to the research space**. This both prevents digital interlopers and reinforces the notion that the data collection is private (Oliffe et al., 2021). Re-iterating the need for privacy at the start of data collection (particularly group data collection) can also help to set expectations for the handling of participants' data. Researchers using video-conferencing may also consider 'locking' the session, and/or using a virtual 'waiting room' or 'lobby' where identity can be established before entry is permitted to avoid meeting spaces being 'hacked' (Hern, 2020).

10. **Researchers need to be aware of the changing privacy features of the different technologies and platforms they intend to use**, and consider these in relation to participants' geographical location, social and political context, age and digital literacy. Privacy features, and the ways these are regulated, are constantly subject to change. As noted by Salmons, 'Researchers must be fully aware of the features – and hazards – of selected interview technologies' (Salmons, 2022). Being aware of the 'digital traces' that might be left on the technology platform being used is critical to maintaining the privacy of participants (Marlowe and Allen, 2022). Where platforms offer a choice of local or cloud storage, local storage will be more secure, or data can be stored on a secure device and deleted from video-conferencing applications (Dube et al., 2023).

11. Researchers should consider **the level of data they need to collect in order to answer their research questions, and the risks it poses to participant privacy**. For example, conducting data collection via video-conferencing with cameras on involves an additional dimension of highly identifiable data (visual) that would not typically be memorialised (through recording) in the case of face-to-face interviews. This can pose additional risks to participant privacy. Kahn and MacEachen (2022) used a dictaphone to capture data generated through video-conferencing, rather than the in-built record function, in order to protect participants, particularly as the topic of their research was sensitive. Through doing so, the interpersonal benefits of visual data could be retained, without some of the increased risks associated with reduced anonymity. Data protection legislation requires justification for any identifiable data collected, so the decision to include this type of data needs to be weighed against participant preferences and ethical principles.,

12. **Special care needs to be taken with data security and storage**. Researchers should be careful to delete text chats from devices (Chen and Neo, 2022). Privacy extends to data gathered through online means (social media),

and how the data is stored and later used or misused (mismanaged, stolen, hacked, sold etc). For instance, when remote interviews are stored in 'the cloud', researchers need to consider where in the world the server is, and what kind of data protection laws are in force (source: consensus conference). Confidentiality agreements with transcribers, and secure means to transfer audio data to them are also critical.

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13. **Researchers should also consider their own privacy** when conducting remote research, by not using personal accounts or technologies (e.g. phones) for data collection (Humphries et al., 2022), and being conscious of how much personal information is accessible to participants (e.g. profile pictures, backgrounds on video-conferencing platforms, desktop wallpaper when sharing screens). Professional research boundaries can become particularly difficult to maintain as researchers typically have public profiles and/or social media presence (source: consensus conference). At the extreme, this may present a safety risk for the researcher, e.g. through persistent messages and threat (Mattheis and Kingdon, 2021). Building in ways to protect researcher privacy, for example, by use of dedicated research devices and profiles, separate to those used by researchers in their personal lives, and use of 'backgrounds' (e.g. images of interiors) on video-conferencing platforms. Funders and institutions can support researchers to protect their privacy through the provision of devices (or the funding to acquire these) and secure environments (e.g. single occupancy offices) in which data collection can occur.

14. It is important to **consider the online/ social media profile or footprint of both researchers and research participants**. This can shape recruitment, rapport, expectations, boundaries and safety before, within, and beyond the data collection event (source: consensus conference) as well as potentially affecting the privacy of participants (Marlowe and Allen, 2018).

Safety and Safeguarding

Physical and psychological safety for both research participants and researchers is of paramount importance (Boynton, 2017). Aspects of safety and safeguarding relevant to face-to-face research may be amplified, reduced or eliminated through use of remote methods (Santhosh et al., 2021); remote methods can also introduce unique safety and safeguarding factors. Furthermore, certain social groups are more vulnerable to safety risks in remote spaces than others (Stone et al., 2020).

Location

When locations are suggested for face-to-face data collection, there is a risk that researchers may suggest a place where one or more participants have experienced trauma. Participants may also suggest locations that involve risk to themselves and/or the researcher and would potentially not be supported as a suitable site of data collection by an ethics committee and/or a risk assessment. Indeed, face-to-face data collection can generate risks for people who are endangered by having researchers in their home environment. This might include those engaged in sex work or living in an abusive relationship. The use of remote methods can be seen as circumventing this difficulty with locations by allowing participants the freedom to select the setting for their participation. (Source: researcher interview)

While choice around the conditions of the data collection may be empowering to participants, they may nevertheless select locations that have the potential to cause harm. Indeed, there are examples in the literature of participants taking part in emotionally challenging remote data collection (e.g. relationship breakdown and suicide) whilst in charge of vehicles (Oliffe et al., 2021; Epp et al., 2022). While researchers can prepare participants for data collection by exploring appropriate locations they may have access to, and times and dates when distractions can be minimised, the researcher may not ultimately know the participant's location and context until the data collection encounter. Whilst rearranging data collection can be suggested, this may not be the participant's preference, meaning that the responsibility of ultimately deciding whether to proceed will fall to the researcher themselves.

It has also been suggested that a move to remote methods reduces researcher access to contextual data. Whilst the sight, sounds and atmosphere of the data collection setting may assist researchers in interpreting their participant's world, particularly in the context of geospatial methods, there is some evidence that this can be replicated in remote contexts, e.g. participants choosing to show objects in their environment, or giving the researcher a 'tour' of their homes. Even 'go-along' interviews may have remote counterparts, as researchers have reported using virtual reality or Google Maps to remotely explore their participants' vicinities (Kostakos et al, 2019), MORE INFORMATION or exploring regional literature and media sources to gain access to a participant's world (Keen et al., 2022).

While this situated data may add richness and may aid with the development of rapport, these techniques also raise ethical issues when researchers are virtually 'taken to' places where they would not go in person (source: interview with researcher). One example is in research with children, where audio-visual interviews via smart phones allow children to carry the phone around the house into usually private spaces. Researchers may feel less able to adequately supervise child participants when they are not co-located (source: interview with researcher). Equally, intervening to protect children's space to participate in the research is harder when that researcher and participant are not co-located (source: interview with researcher). For example, adults co-located with children sometimes intrude on the data collection. However, there are instances where this dynamic can be productive (Mannay et al., 2023).

Indeed, in the context of remote interview methods, participants have to take greater responsibility for their own environment and its implications for well-being. For people experiencing intimate partner violence, ensuring the data collection content will not endanger them (source: consensus conference), safety checking at the start of data collection (asking who else is in the vicinity) and having a 'safe phrase' to exit the data collection quickly e.g. 'I think you have the wrong number' can be employed and signal danger to the researcher (Alderson et al., 2022). Indeed, people who are experiencing violence, particularly in closely knit environments, are more prone to surveillance, and they might be monitored when interacting with researchers (Little, 2017). Gatekeepers (e.g. advocacy groups) may be an important resource in managing safety (Alderson et al., 2022), and risk assessments may need to be carried out (source: consensus conference).

For researchers, the use of remote methods can move research into their own homes or other private spaces, potentially blurring the lines between public, work and private spaces (Lobe et al., 2020, Jenner and Myers, 2019). For example, during an interview with a researcher, they commented that it could be difficult to move directly from hearing difficult stories to 'making tea for the family' (source: interview with researcher).

While remote methods remove the risks of lone working when conducting face-to-face data collection and provides flexible opportunities to access participants who may otherwise be unreachable, the permeation of the research into the researcher's physical space (especially if participants can gain a lot of information about the researcher from seeing their home environment) can be associated with psychological or even physical risks. These risks can occur before, during or after data collection events (e.g. receiving unwanted messages on work devices kept at home). Researchers should consider when/where they conduct their remote data collection, how much information about themselves is contained in their background, whilst also ensuring they have access to appropriate support available for both them and their participants, whilst retaining professional boundaries. Universities, research organisations, funders and ethics committees all have a role to play in supporting researchers to find safe physical and remote environments for qualitative data collection through risk assessments and safety protocols (Mattheis and Kingdon, 2021).

Psychological Distress

For any research topic, participant distress is a possibility (Braun and Clarke, 2013: 89). Indeed, participants are often motivated to take part in research despite knowing it might be upsetting. MORE INFORMATION This can be attributed to an altruistic desire to improve the lives of others (Heath et al., 2018), or the data collection can provide an opportunity for participants to vent or process uncomfortable feelings (source: consensus conference; Humphries et al, 2022). However, it may be harder for researchers to identify signs of participant distress during remote data collection compared to face-to-face (Thunberg and Arnell, 2022; Epp et al., 2022; Humphries et al., 2022), which can make managing this hard. While rapport and human connection are integral to qualitative research, it is important to recognise the emotional labour of conducting qualitative data collection, and the psychological risks, including the possibility of 'vicarious trauma' for researchers (Isobel, 2021). Being able to offer flexible opportunities to take part in research is a significant benefit of remote data collection but may also entail risks for researchers.

As noted by Humphries et al. (2022), asynchronous remote data collection, in particular, can involve long periods of silence between contacts, which can leave the researcher feeling anxious about how the participant is coping. Existing guidance recommends that data collection is not conducted when a researcher is already tired from a long day or when support is not available (e.g. buddy or debriefing) (Silverio et al., 2022). In practice, a positive research culture and trust are essential for ethical debriefing to occur (whilst protecting participant confidentiality). Indeed, it involves varying degrees of personal and professional vulnerability, which may have different levels of impact on researchers depending on their career stage and how established their professional relationships are (in the context of fixed-term contracts for early career researchers, these relationships may not be as well developed).

The seeming time efficiency of remote methods, and the pressures of research delivery, can also lead to researchers scheduling multiple data collection events in a single day- a practice that may preclude appropriate self-care, as well as the cross-pollination of research findings and question refinement that often develops following analysis of early data. For asynchronous text-based methods, data collection can occur over much longer periods of time than synchronous methods, during which psychological distress, on the part of both the researcher and participant, may be more insidious, harder to detect and can also be cumulative in nature (Fritz and Vandermause, 2018). It is therefore important that researchers (as well as institutions, ethics committees and funding bodies) consider the psychological impacts of remote qualitative fieldwork, and the ways that these can extend beyond those associated with face-to-face research. Pascoe Leahy (2021) introduces the notion of an 'afterlife' of qualitative research that can persist long after the data collection event. For remote research, which can be conducted over extended time periods, the impacts may be particularly pronounced (Humphries et al., 2022). The use of distress protocols for both researchers and participants, which may include providing access to external counselling services for researchers (Bhatia et al., 2022) and/or de-briefing (Whitney & Evered, 2022).

Methods to 'contain' the research both during data collection itself (e.g. ensuring that messages or emails do not 'pop up' on a screen, but instead go directly into a dedicated folder that the researcher can access when they are in a position to), and afterwards (e.g. 'debriefing' with another member of the research team) can help to manage some of these difficulties, and offset the implications of working in an 'unbounded' research space.

Safeguarding

Research with children and other vulnerable groups raises particular issues around safeguarding (Bhatia et al., 2022). When working remotely, it may be harder to intervene to protect participants from themselves or others, and researchers may not have an address or contact details for participants, e.g. in text only data collection methods where only an online alias is used (Anderson et al., 2021). Researchers may have a feeling of powerlessness to intervene (Gibson, 2020; source: consensus conference), and there needs to be an appropriate balance between protecting participants and respecting their agency (Nkosi et al., 2022).

Safeguarding protocols in instances where participants disclose risk of serious harm to self or others may need to be adapted for remote context. For example, a process of consultation and escalation within the research team for considering whether the risk is sufficiently high that researchers require information about participants location and a plan of action. In relation to children, this threshold needs to be set low. Safeguarding protocols should ideally be co-produced with relevant stakeholders (source: consensus conference) and in partnership with organisations and institutions where participants can be referred (Bhatia et al, 2022; Hawk et al., 2021). This is especially the case when the research directly explores topics that may lead to disclosures, such as those on violence, abuse and self-harm (Bhatia et al., 2022).

Summary

Remote data collection can allow participants more control over what data they provide and when, including information about themselves that are more apparent when face-to-face (e.g. age group, mobility disability). This can be empowering for participants. Remote data collection involves handing responsibility for privacy and safety during data collection to the participant. This may be problematic for the participant particularly where having individual space is not the norm, where there is political surveillance, in precarious home situations and where the participant requires the assistance of a second person. In advance of data collection, researchers need to plan what they will do if they are concerned about confidentiality or participant safety. Researchers need to ensure participants understand how to avoid inadvertently sharing more information than intended through digital modalities (e.g. phone number revealed to other participants). Digital modalities can be set up to provide the greatest level of anonymity and privacy available for qualitative data collection. Researchers need to plan what to do if they are concerned for their participants safety and well-being, and for their own.

Researcher Prompts:

1. **What are the power differentials likely to be at play during data collection; how might remote collection change these?**
2. **What will you and your participants not know about each other when using digital modalities (unless specifically revealed); how does this impact the data and its analysis?**
3. **How well do you understand the potential challenges for participants in ensuring their own privacy and safety during data collection?**
4. **Are you up to date with the privacy features of all the digital modalities you are considering; how will you advise your participants about privacy?**
5. **What will you do if you are concerned for the privacy, safety or distress of your participant?**
6. **What are your plans for your own safety and wellbeing?**

Section 7: Ending Remote Qualitative Data Collection

Withdrawal from the research field when qualitative data is collected remotely is very different to when it is collected face-to-face. As such, it needs to be planned for in advance of data collection. For research that is particularly sensitive or has covered a long period of time with frequent contact, ending data collection can be particularly challenging, especially if both researcher and participant have formed an 'attachment' during data collection (Watts, 2008), a relationship which, whilst providing the conditions for the disclosure of sensitive data, can more closely mimic 'friendship'. While it is important to note that the use of remote methods can give participants swifter, and less socially awkward, opportunities to initiate the close of data collection (e.g. putting the phone down) (Enoch et al., 2023), this heightened autonomy has been addressed in Control and Autonomy. MORE INFORMATION
This section therefore focuses on researcher initiated close of data collection.

Leaving the field: Video-conferencing/ audio only data collection

When researchers and participant(s) are not co-located, additional planning is needed to ensure participants are supported before, during, and after data collection. Remote data collection means that the physical processes involved in leaving a face-to-face interview (putting on coats, walking to the exit etc.), when the researcher has the opportunity to talk informally to the participant, check their well-being and bring them back to daily life, are lost. Their absence can be challenging in remote data collection. In the case of interviews using video-conferencing, the fact that the data collection space looks much the same once recording has stopped does not provide a signal that the data collection has ended in the same way as turning off a recording device and leaving a physical room does. MORE INFORMATION

> ***"Unlike face-to-face interviews, [video-conferencing] interviews do not include the subsequent exchange when the interaction can wind down on the way out of a building and well-being can be checked in a social milieu. Instead, a process of closure is enacted in the same frame as the interview, and without clear direction from the interviewer, may go unnoticed." (Engward et al., 2022; 6)***

It is important that participants do not feel that they have simply been 'mined for data' and then dropped (Engward et al., 2022: 5). Strategies to avoid this might include careful verbal signposting, to make clear to the participant that the data collection is coming to an end, but also 'checking in' once recording has stopped so that those who want to de-brief are able to do so. Indeed, the abrupt ending of data collection can mean that supportive interactions after the formal end of the interview can be missed. Not booking data collection events back-to-back to free researchers up to support participants with the transition has been suggested as a means to manage this in remote contexts (Engward et al., 2022). Furthermore, follow-up emails, or sending the participant their transcript for checking have also been suggested as ways to both 'check in with' participants, whilst also providing them with an opportunity to mention things they may have missed during the data collection or that have occurred to them since. It can also keep the option of further data collection open (source: consensus conference). However, the benefits of returning transcripts to participants is contested as a research practice as it can be viewed as a source of embarrassment, or even threat, by participants, and even more so than the data collection event itself (Mero-Jaffe, 2012). Participants may correct the transcripts for coherence and grammar to render themselves more articulate by removing 'filler' words (e.g. um, ah) and also improve their vocabulary. In remote contexts, returning transcripts can be useful in terms of ensuring all data is captured as there are more likely to be gaps than data produced by face-to-face research (e.g. due to interruptions to the network connection during data collection). However, at the same time, participants may also remove data that is considered significant by the researcher. Any decision to return transcripts to participants, therefore, needs to consider the ethical implications of doing so, as well as the implications for data security and participant safeguarding should the transcript be intercepted. MORE INFORMATION

Leaving the Field: text-based data collection

As text-based asynchronous data collection is usually conducted over longer periods of time than synchronous methods, exiting the field can be more complex. As noted by Gibson (2020), prolonged access to the researcher can make the boundaries of the research harder to maintain, MORE INFORMATION

> ***"Leaving the WhatsApp conversation open for a few days following the interview, in order to allow the participant the option of providing further insights, challenged the traditional boundaries we use to demarcate the beginning and end of an interview. This situation might result in a lack of clarity about what material can and cannot be used in the research" (Gibson, 2020: 625-626).***

With text-based data collection techniques, the method of any follow-up communication is likely to be the same as it was for data collection. As such, researchers need to be very clear what is being counted as data and what is not. Methods have been developed to 'contain' text-based asynchronous data collection, such as email, e.g. by specifying a timeframe, or a maximum number of questions or interactions (Bowden & Galindo-Gonzalez, 2015; Gibson, 2017a). It has been argued that setting such boundaries does not have a deleterious impact on data quality as the greatest amount of data are often communicated during early interactions, but wanes over time (Kivits, 2005). However, setting these boundaries may impact rapport building and trust, MORE INFORMATION and it is important that researchers allow time within their research design to support the creation of a 'safe space' for data collection.

Summary

Routes to end remote data collection need to be planned for from the outset of the research, and participants need to be informed prior to the start of data collection as to how this will be signalled. Depending on the synchronicity of the data collection and the technology used, this may look very different across methods. For synchronous methods, particularly those without video (e.g. telephone), the researcher needs to clearly indicate that recording/data gathering has stopped. For asynchronous methods, ending data collection can involve additional challenges. Whilst researchers might set expectations regarding the duration and volume of exchanges, various factors can extend or reduce the expected parameters of the data collection (e.g. poor network coverage or life events might cause delays in participants' responses). Closing data collection following extended periods of contact can be particularly challenging to negotiate. Whilst it has been suggested that leaving the data collection space open to further communications can assist with ending lengthy data collection periods, how this additional data will be handled needs to be made clear to participants, and consent for analysing this data should be explicitly sought.

Researcher Prompts:

1. **How will you prepare participants for the end of data collection?**
2. **How will you signal to participants that data collection has ended?**
3. **What follow up contact will you offer, if any, for how long, and why?**
4. **How will any inappropriate contact from participants beyond the end of the project be handled?**

Section 8: Discussion: Remote Qualitative Methods in the Wider Research Context

Since the pandemic, the use of remote qualitative data collection methods has hugely increased. Face-to-face methods are no longer the unquestioned 'gold-standard', and new conversations have opened up about the value of remote methods for data quality and inclusive research. The continued, and increasing, use of remote communication in the wider world has arguably shifted attitudes towards remote research, and the level of trust placed in it by participants, researchers and institutions.

Pre-pandemic, the pros and cons of remote data collection tended to be weighed in broadbrush strokes. Remotely-collected data was understood to be shorter, often with the absence of non-verbal data, but with similar thematic content. It is our contention that the use of remote data collection methods nevertheless fundamentally shifts the configuration of the qualitative research space, the type of data produced, as well as the interactions and relationships between researchers and participants. Understanding the impact of these shifts, in multiple contexts, is pivotal to the future of remote methods within the wider qualitative landscape. MORE INFORMATION

The QRDC guidance has been developed through, and for, this evolving research environment. It has been designed to meet the needs of researchers considering whether, when and how remote data collection methods may be appropriate for their qualitative research topic. However, it is also relevant to wider research communities, including research participants, research stakeholder groups and communities (e.g. advocacy groups/charities), PPI groups, ethics committees, institutions and research organisations, as well as to funders and publishers of qualitative research.

Indeed, whilst this guidance has focused on prompts for researchers, similar prompts, drawing on the findings of the QRDC study, could be developed for prospective research participants and included in recruitment and consent materials, e.g. participant information sheets and consent forms. These could include encouraging (would be) participants, with the support of the researcher, to consider their access needs to effectively participate in remote research and their relationship to, and familiarity with, the technology/platform being offered (whilst considering whether a different technology/platform would be more appropriate). These materials could also be used to highlight the possibility of requesting a 'trial run' with the researcher, and prompting this group to consider, along with the researcher, which aspects of the research process (e.g. their immediate privacy during data collection) will fall under their control when data is collected remotely, and to co-develop strategies to overcome any identified threats to privacy, confidentiality or safety, which may include defaulting to face-to-face methods.

Similarly, reporting standards for remote qualitative methods are still emerging. Existing qualitative reporting frameworks such as COREQ (consolidated criteria for reporting qualitative research) (Tong et al, 2007), for example, whilst including the 'setting' of data collection, the influence of non-participants in the research space as well as duration of the data collection, do not cover components unique to remote qualitative methods such as: i) the synchronicity of data collection (a unique feature of remote data collection), ii) the technology/platform used, its features and how these were used (or not) by participants, iii) any difficulties (technological/practical) encountered and how they were resolved or mitigated against (e.g. trial run), iv) the respective environments of the participant and researcher during data collection, or v) the format of data collected (e.g. text, images/GIFs (graphics interchange format), emojis, audio, audio-visual, or combinations of all four). As highlighted within this guidance, these factors have a significant impact on both rapport and the quality and quantity of data produced, demonstrating the need for consistency in reporting of remote qualitative studies to support quality appraisal and validity of findings.

Despite these areas where further research is needed, the benefits of remote methods are clearly demonstrated within the extant literature. They include their relative speed and their potential to be tailored to meet the needs and abilities of both participants and researchers. Their flexibility, adaptability and ability to circumvent the barriers of time and place, render them particularly well suited to inclusive research projects where diversity of participants and/or wide geographic reach is essential. Use of remote methods can also contribute to efforts to lower the carbon footprint of qualitative research, for example, by avoiding the need for travel, printing, and in some instances, transcribing. They also generate spaces for creativity and innovation, introduce different types of data (e.g. emojis, textese) and, overall, are more sustainable and cost-effective (due to the removal of travel and accommodation costs) than their face-to-face counterparts. In the context of rising travel costs, international research collaborations, and precarious employment contracts for researchers (especially those who are early career), there is sustained pressure for researchers to design studies that are competitively costed and represent good value for money. These wider contextual factors can make remote data collection methods more attractive to researchers, institutions and funders alike. However, their relative benefits and challenges need to be considered carefully, as well as the way that the needs, preferences and wider social context of the participant group of interest directly shapes them.

Remote qualitative methods bring with them their own complexities. They can make rapport and human connection more challenging, and they can also introduce additional dimensions to ethical concerns around data access, ownership and security. Moreover, the endurance of digital exclusion (Allmann, 2022) and increasing recognition of the role of digital disengagement (Romanowski & Lally, 2024) underscores the need to resist the positioning of remote methods as the solution to widespread and persistent research inequities. The inclusion of social groups whose voices are currently underrepresented, or absent entirely, in health and social care research may mean, in certain circumstances, a reversion to face-to-face interactions and trust-building with underserved communities before data collection could even be considered.

It is imperative that funding bodies, institutions/research organisations and ethics committees, as well as qualitative researchers themselves, are mindful that use of remote methods does not perpetuate the absence of marginalised voices in health and social care research. Tensions between inclusive research practice and research governance requirements can be particularly heightened in remote research. For example, there may be in mismatches between technologies approved at an institutional level, and those which best meet the needs and preferences of research participants. There is a pressing need, amplified and illuminated through the choices facing researchers regarding use of remote data collection methods, to consider participant derived interpretations of privacy, access and control. Thinking 'outside the box', developing creative co-produced strategies with participants to remove barriers to research participation and working directly with ethics committees on issues of access to research (Walsh et al, 2024; Northway et al., 2014) are vital for inclusive research practice.

The evidence explored in this guidance also points to the importance of foregrounding participant choice and autonomy, and of offering a bespoke range of data collection methods that align with participants' needs, communication preferences and abilities. Adopting flexible, hybrid, remote methods offer participants greater agency to control the conditions of their data collection encounter/s in ways that have not previously been possible. Rather than erosion of the researcher's role, this shift can be highly productive, providing opportunities to alter power dynamics and offering new ways of working between researchers and participants.

As communication technologies continue to evolve, proliferate and diversify, and artificial intelligence is changing the way we live and work, the avenues through which remote data can be collected are ever-expanding. This has the potential to both support (greater access), and threaten (chatbots), the validity of remotely collected data (Dudeck, 2016). It is therefore paramount that researchers, funding bodies, ethics committees and institutions keep up to date with the evolving features of technologies and the wider technological and data infrastructure in which they sit. Technology developers and researchers need to work together to ensure that the range of platforms emerging to support remote qualitative research are grounded in the principles of ethical research practice and robust research design.

Dialogue around, and training in, remote methods is also pivotal to this endeavour, along with the direct involvement of patient and public contributors. In particular, there is a need for capacity building in relation to remote qualitative research design, safeguarding and ethics. The transitions in and out of remote data collection events, as well as the communication skills needed to navigate them whilst remaining attentive to participant distress, are key areas where skills developed in face-to-face research do not translate seamlessly into remote contexts. Likewise, research participants also need support and resources in order that they may exercise insightful choices regarding their involvement in qualitative research. Where, when and how remote data collection occurs, as well as the potential consequences and outputs of that participation need to be carefully considered, and the simple transfer of these decisions to would-be participants is insufficient to achieve meaningful, and safe, research engagement.

Overall, remote methods offer qualitative researchers a valuable tool- a chance to remove barriers and connect to groups that have previously been excluded from, and sometimes harmed by, researchers. Rather than a panacea for qualitative research, however, remote methods bring with them their own set of challenges, and their use needs to be situated within this broader context of power politics, if their benefits are to be realised.

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Glossary

Autoethnography:
a form of ethnography where the researcher links their personal experiences to social, political and cultural contexts (Ellis et al, 2011)

Avatar:
an image representing a person

Chatbots:
computer programmes designed for interaction with humans

Chatrooms:
a closed online space which allows users to communicate with each other in real time

Cloud storage:
a virtual storage platform for data

Digital disengagement:
the act of those who do not participate in the digital world due to 'motivational or personal reasons' (Romanowski & Lally, 2024).

Digital exclusion:
barriers that prevent access to the digital world, which may include technology deprivation, lack of skills or barriers relating to accessibility (Allmann, 2022).

Emojis:
typically a small image used to express or emphasise an idea or feeling

Emoticons:
an image of a facial expression used to supplement remote communication

Fidget toys:
small objects that can be manipulated by hand, often used for calming or distracting purposes

Hacking:
gaining unauthorised access to remote data or computer systems

Hashtags:
a symbol followed by a word that can be used to help label and group content, typically on social media

Ideograms:
a picture or symbol used to represent a thing or idea but not a particular word or phrase but not its individual sounds

Memes:
an image, video or piece of text that is shared rapidly by internet users. The content is typically humorous or entertaining.

'Near-synchronous':
a form of communication that is slower than real time, but not slow enough to be asynchronous. For example, participants may respond 15- 30 minutes after a question is asked.

Photosymbols:
pictures used for easy read documents

Stop/start animation:
an animation that is captured frame by frame

Textese:
abbreviated language used in text communication

Typos:
typographical errors

Voice note:
a note, typically short, made by speaking into a digital device

Zoom Bombers:
uninvited intruders into video-conferencing calls. Zoom bombers may invade remotely or into a person's physical space as they are participating in a video-conferencing call. Whilst the term was originally used in relation to the Zoom platform, the term is used to describe disruptive interlopers across platforms.

Zoom fatigue:
tiredness (physical and psychological) associated with time spent engaging in remote communication via video-conferencing. Whilst the term was originally used in relation to the Zoom platform, the term is used across platforms to refer to this form of fatigue.

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Appendix 1:
Web Resources

AbilityNet. UK-based charity supporting digital accessibility for all. https://abilitynet.org.uk/ including free resources, such as fact sheets advice and information about how computers and other digital technologies can be adapted for use by people with a wide range of conditions and impairments: https://abilitynet.org.uk/free-tech-support-and-info/abilitynet-factsheets

Anderdal Bakken, Silje (n.d.) How to…interview across text-based messaging applications. Social Research Association Blog https://the-sra.org.uk/SRA/Blog/Howtointerviewacrosstextbasedmessagingapplications.aspx?utm_sq=gzy0vi36b2

Cook, N. 2021. Conducting Virtual Focus Groups https://www.youtube.com/watch?v=u_iyUAy0ZhQ

Digital Poverty Alliance. UK-based charity tackling digital exclusion. See Charter for Digital Exclusion: https://digitalpovertyalliance.org/charter-digital-inclusion/ and UK Digital Poverty Evidence Review https://digitalpovertyalliance.org/uk-digital-poverty-evidence-review-2022/

Generation R. National network of Young People's Advisory Group's (YPAGs) based across the UK, funded by NIHR to support the design and delivery of paediatric research in the UK. Includes resources to support engagement and inclusion (remote and face-to-face) aimed at young people https://generationr.org.uk/about/ e.g. games, quizzes and videos https://generationr.org.uk/games-quizzes-more/

Good Things Foundation, UK's leading digital inclusion charity, including digital inclusion research and evidence: https://www.goodthingsfoundation.org/

Horizon Digital Horizon Research. UKRI funded Horizon Digital Economy Research Institute (University of Nottinhgham) focusing on 'researching, promoting and championing the potential of 'ubiquitous digital technology', looking at the challenges of providing a new generation of personally meaningful experiences that use the traces we leave behind when we interact with mobile, internet and other digital technologies.' https://www.horizon.ac.uk/

Internet Research: Ethical Guidelines 3.0 Association of Internet Researchers. 2019. https://aoir.org/reports/ethics3.pdf

LSE Digital Ethnography Collective Reading List March 2020 https://zoeglatt.com/wp-content/uploads/2020/03/LSE-Digital-Ethnography-Collective-Reading-List-March-2020.pdf

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PPI Resources (NIHR) PPI (Patient and Public Involvement) resources for applicants to NIHR research programmes https://www.nihr.ac.uk/documents/ppi-patient-and-public-involvement-resources-for-applicants-to-nihr-research-programmes/23437

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W3C Web Accessibility Initiative (n.d.) https://www.w3.org/WAI/standards-guidelines/wcag/

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Appendix 2
QRDC Interview Guides: Research Participants

Each interview will be tailored around the participant's experience with qualitative data collection (remote or face-to-face), informed by why we have recruited them.

Introductions and consent process

Hello (Name)
THANKS

- Thank you for your **willingness** to participate in this interview.

- Just to remind you that the aims of this interview are to hear your views and experiences of participating in remote qualitative research, and to discuss recommendations or suggestions you may have for doing high quality Qualitative Remote Data Collection.

- Please be reminded that you can pause or stop this interview at any point in time.

- Be assured that your data will be handled confidentially, and I will remove anything that can identify you.

- Please feel free to let me know if you need to interrupt the interview at some point.

- We expect to finish the interview in the next hour, at about 1pm. Please do let me know if you have a time when you need to finish by.

- If at the end of the hour we have not completed the discussion and you are happy to have further discussion, we can pick up the interview at a later time.

- Please I would like to record this interview, so that I capture all we discuss. However, when I ask about your sociodemographic information, I will turn off the recording.

- Please I will now read out the consent form and ask you to kindly confirm each item. I will record the consent taking process and transcribe it in the same way as the rest of the interview.

Please can I start recording the interview now?

Consent taking

1. I confirm that I have read and understand the information sheet [insert version number] for the above study.

2. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.

3. I understand that my participation is voluntary and that I am free to withdraw at any time during the research process without giving a reason, and without my legal rights being affected. I understand I can completely withdraw the transcript of my interview from the study up to 14 days after it has been sent to me, and after this date, I can still opt out of my transcript being quoted in any research outputs.

4. I understand that the information collected for this study is governed by the General Data Protection Regulation (GDPR) and all data will be stored in a secure format and used only for strictly defined purposes.

5. I understand that pseudonymised data collected during the interview may be looked at by individuals from the research team and Public Reference Group. I give permission for these individuals to have access to my pseudonymised data.

6. I understand that the interview will be video- or audio-recorded

7. I understand that the video- or audio-recording of my interview will be transcribed by a company approved by the University of Warwick that is contractually obliged to safeguard any personal, identifiable data.

8. I understand that transcriptions of the interview will be pseudonymised and my name and other details that might identify me will be removed.

9. I agree that pseudonymised quotations from my interview may be used when sharing the findings of the research. This might include but is not limited to peer-reviewed, academic publications, presentations, public engagement activities and teaching.

10. I am happy for my pseudonymised data to be used in future research.

11. I agree to take part in the above study.

Summary about structure of the interview

- Just to describe the structure of our interview:

- I will start by asking you questions about your experience of participating in qualitative research both remote and face to face.

- As we go along, I will ask you to reflect on these experiences.

- Later in the interview I will ask your thoughts about some statements we have developed on remote qualitative data collection.

- We have developed these statements from our experience and from suggestions made by authors evaluating remote data collection methods. We want to work with you on thinking through some of these statements.

- I will then ask your suggestions for the guidance we intend to develop for researchers.

- I will wrap up the interviews by eliciting some sociodemographic information from you and asking you to reflect on the experience of this remote interview.

Part 1: Qualitative research experience

1. To start, please tell me about your experience with taking part in qualitative research
   - What research have you participated in?
     - o Topic(s)
     - o Type of research: Interview, focus group, etc
     - o Remote and/or face-to-face studies?
   - How many interviews/FGDs have you participated in?
     - o Where >1: Were these interviews/ FGDs with the same person or different researchers?
   - When were you involved??

2. For those who have not been involved in remote data collection: Have you ever been invited to take part in remote research?
   - If yes, can you tell me why you decided not to participate?
   - Explore reasons if offered.

3. Can you talk me through your [recent/ memorable] experience of being in an interview/FGD?

Note to interviewer: For those with experience of remote and face-to-face methods, focus on the remote experience.
- How did you come to be involved?
  - o Recruitment and consent
  - o Preparation (including technology access)
  - o Location of the interview
- Describe what happened in the interview
  - o How was it run?
  - o Relationship with interviewer?
  - o Involvement of anyone else?
  - o Distractions?
- What worked well in the interview?
  - o Examples
  - o If relevant: comparison with face-to-face and other remote methods
- Were there any challenges?
  - o Examples
  - o What did you/the researcher do?
  - o If relevant, comparison with face-to-face and other remote methods
- Would you have liked to have done anything differently? If so, what? Why?
- Would you have liked the interviewer to have done anything differently? If so what? Why?

4. If the interview/FGD had happened face-to-face, how do think it would have been different? Why?

For those without remote experience: What do you think would have been different if the interview/ FGD had happened remotely? Why?

5. Would you have preferred to participate in a face-to-face interview/FGD if you had the choice? Why?

   For those without remote experience: Would you have preferred to participate in a remote interview/FGD if you had the choice? Why?

6. For those with experiences of >1 type of remote method:
   - Were there any differences?
   - Were there any similarities between the methods?
   - Did you have any preferences? Why?

7. Whose voices may be missed when interviews/FGDs take place remotely? Why?

8. Whose voices can be included when interviews/FGDs take place remotely? Why?

9. Can you describe any situations or topics that you think won't work well in a remote interview/FGD? Why? Add in CMOS/statements

Bring in CMOS- choose (prioritise) based on what they've been saying (power point presentation)

10. What do you think makes for high quality remote qualitative research?

11. In our study, we want to produce guidance to support researchers to do high-quality remote qualitative research.
    - What would you like to see in this guidance?
    - What do you think a researcher can do to make the interview/FGD of high quality?
    - What information would help a potential research participant to decide whether (or not) to take part in a remote interview/FGD?

I will now turn off the recording to ask your sociodemographic information

Turn off recording

Part 2: Confirming demographic details and closure

1. As we start to wrap up, please can I confirm your demographic details

   Note to interviewer: Where this information has arisen spontaneously as part of interview, this will not be asked.

   - How would you describe your ethnicity?
     - **Arab**
       Arab.
     - **Asian, or Asian British**
       Bangladeshi or Bangladeshi British
       Chinese or Chinese British
       Indian or Indian British
       Pakistani or Pakistani British
       Any other Asian background.
     - **Black**
       African or African British
       Caribbean or Caribbean British
       Any other Black background.
     - **Mixed or multiple ethnic groups**
       White or White British and Asian or Asian British
       White or White British and Black African or Black African British White or White British and Black Caribbean or Black Caribbean British Any other mixed or multiple ethnic background.
     - **White**
       English, Scottish, Welsh, Northern Irish or British Gypsy or Irish Traveller Irish Roma
       Any other white background
       Any other ethnic background
       Not known
       Prefer not to say

   - What is your age category? 18-25, 26-35, 36-45, 46-55, 56-65, 65+
     - 19 and under
     - 20 – 24
     - 25 – 29
     - 30 – 34
     - 35 – 39
     - 40 – 44
     - 45 – 49
     - 50 – 54
     - 55 – 59
     - 60 – 64
     - 65 and over
     - Prefer not to say

   - What is your highest qualification level?
     - No qualifications
     - GCSE or O Level
     - GCE, A level or similar
     - Vocational (BTEC/NVQ/Diploma)
     - Degree level or above
     - Other (please specify) :

- Do you have an impairment, health condition or learning difference that has a substantial or long-term impact on your ability to carry out day-to-day activities?
  - Yes
  - No
  - Prefer not to say.

- (If yes) please select all of the following that apply to you:
  - Blind or have a visual impairment uncorrected by glasses
  - D/deaf or have a hearing impairment
  - Development condition that you have had since childhood which affects motor, cognitive, social and emotional skills, and speech and language
  - Learning difference such as dyslexia, dyspraxia or AD(H)D
  - Long-term illness or health condition such as cancer, HIV, diabetes, chronic heart disease or epilepsy
  - Mental health condition, challenge or disorder, such as depression, schizophrenia or anxiety
  - Physical impairment (a condition that substantially limits one or more basic physical activities such as walking, climbing stairs, lifting or carrying) (mobility)
  - Social/communication conditions such as a speech and language impairment or an autistic spectrum condition
  - Prefer not to say
  - An impairment, health condition or learning difference not listed above (specify, if you wish).

- (i) What region in the UK do you live in?
  (ii) How would describe the area that you live in? Is it a city, town, suburbs of a city or town, village or rural/remote area?

- Which topic(s) of previous research have you undertaken?

2. We are keen to explore the views and experiences of a diverse range of people who have previously taken part in qualitative health and social care research where data was collected using remote methods. Do you have any suggestions for how we might reach other research participants who might be interested in participating in our study? Please will you pass on details of the study.

3. Would you like us to send you a copy of the interview transcript? If yes, confirm details (email or by post). You will have two weeks to request any changes to the transcript before analysis.

4. Reminder of withdrawal process

5. Discuss voucher

Turn on recording

Part 3: The experience of participating in this interview

3.1. Finally, I would like to invite you to reflect on the experience of participating in this remote interview.

Could you please tell me your about your experience of this remote interview?

- Prompts:

'What would a good/the ideal interview look like from your perspective?

What needs to be in place to make it good?

'How is this different from a good face-to-face interview?

3.2. Any questions for us?

Thank participant and close interview

Appendix 3
QRDC Interview Guide: Researchers

Each interview will be tailored around the methodological expertise and experience of the research participant, informed by why we have recruited them (i.e. using their publications, knowledge about their particular methodological approach etc).

Introductions and consent process

- Hello (Name)
- Thank you for your willingness to participate in this interview.
- Just to remind you that the aims of this interview are to hear your views and experiences of doing remote qualitative research, and to discuss recommendations or suggestions you may have for doing high quality Qualitative Remote Data Collection.
- Please be reminded that you can pause or stop this interview at any point in time.
- Your responses will be stripped of all identifiers and handled confidentially.
- Please feel free to let me know if you need to interrupt the interview at some point.
- We expect to finish the interview in the next hour (at ??). Please do let me know if you have a time when you need to finish by.
- If at the end of the hour we have not completed the discussion and you are happy to have further discussion, we can pick up the interview at a later time.
- Please I would like to record our interview to capture what we discuss. But when I ask you about your sociodemographic information, I will turn off the recording.
- Please I will now read out the consent form and ask you to kindly confirm each item. I will record the consent taking process and transcribe it in the same way as the rest of the interview.

Start recording

- Please can I start recording the interview?

Consent taking

1. I confirm that I have read and understand the information sheet [insert version number] for the above study.
2. I have had the opportunity to consider the information, ask questions and have had these answered satisfactorily.
3. I understand that my participation is voluntary and that I am free to withdraw at any time during the research process without giving a reason, and without my legal rights being affected. I understand I can completely withdraw the transcript of my interview from the study up to 14 days after it has been sent to me, and after this date, I can still opt out of my transcript being quoted in any research outputs.
4. I understand that the information collected for this study is governed by the General Data Protection Regulation (GDPR) and all data will be stored in a secure format and used only for strictly defined purposes.
5. I understand that pseudonymised data collected during the interview may be looked at by individuals from the research team and Public Reference Group. I give permission for these individuals to have access to my pseudonymised data.
6. I understand that the interview will be video- or audio-recorded
7. I understand that the video- or audio-recording of my interview will be transcribed by a company approved by the University of Warwick that is contractually obliged to safeguard any personal, identifiable data.
8. I understand that transcriptions of the interview will be pseudonymised and my name and other details that might identify me will be removed.
9. I agree that pseudonymised quotations from my interview may be used when sharing The findings of the research. This might include in but is not limited to peer-reviewed, academic publications, presentations, public engagement activities and teaching.
10. I am happy for my pseudonymised data to be used in future research.
11. I agree to take part in the above study.

Name of Participant Date Signature

Name of Person Date Signature taking consent

Structure of the interview

- I will start the interview by exploring your experience as a researcher.
- I have read your website but there may be details that I have missed. I will then ask in detail about your experiences of qualitative data collection, both remote and face-to-face.
- As we go along, I will ask you to reflect on these experiences. I want to drill down into why you made the research decisions you did, the effect it had on the data, and your learning from your experience about when and why remote data collection works well or not. We want to learn from your expertise.
- Later in the interview I will ask your thoughts about some statements we have developed on remote qualitative data collection. We have developed these statements from our experience and from suggestions made by authors evaluating remote data collection methods. We want to work with you on thinking through some of these statements.
- Next, I will then ask your suggestions for the guidance we intend to develop for researchers.
- I will wrap up the interviews by eliciting some sociodemographic information from you and asking you to reflect on the experience of this remote interview.

Part 1: Professional background and qualitative research experience

1. To start, please tell me a bit about yourself as a qualitative researcher
   - Field of study
   - Length of time working qualitatively
   - Types of qualitative data collection activities undertaken (focus groups, individual interviews, observations etc) both face-to-face and remotely (where possible, estimate number)
2. You have used [a variety of/ or particular] remote method(s). For each method...When and why have you used this method?
   - Rationale/ when, why and how?
   - Context
   - Planned or unexpected shift (pandemic) or both
   - Participants
3. [For this particular topic/group of participants - as just identified], what works well with this remote method?
   - Examples/when does this work well, with whom (including other types of participants)? Why?
   - Comparison with face-to-face and other remote methods (where experience)
4. What are the challenges?
   - Whose voices may be missed when collecting data this way? Why?
   - Comparison with face-to-face and other remote methods (where experience)
   - Examples and actual experiences in their own research (as part of each prompt)
5. In what ways do you think [each remote method] shapes the research process? Why?
   - Data produced and quality
   - Researcher-participant relationship
   - Impact on participant
   - Impact in researcher
6. If you were designing a study using these methods now, what would you do differently?
   - Why and how?

Bring in CMOS- choose (prioritise) based on what they have been saying

Power point presentation of CMOs (pick out relevant ones based on their previous responses)

In our study, we are aiming to produce guidance to support researchers to do high-quality remote qualitative research.

- What would you like to see in this guidance?
- What do you think makes for high quality remote qualitative research?
  Inclusivity , Participation, Data richness
  Depth, Exchange

Turn off recording

Part 2: Confirming demographic details and closure

1. As we start to wrap up, please can I confirm your demographic details [explain purpose - Line up with JR script/process].

   Note to interviewer: Where this information has arisen spontaneously as part of interview, this will not be asked.

   - How would you describe your ethnicity?
     - **Arab**
       Arab.
     - **Asian, or Asian British**
       Bangladeshi or Bangladeshi British
       Chinese or Chinese British
       Indian or Indian British
       Pakistani or Pakistani British
       Any other Asian background.
     - **Black**
       African or African British
       Caribbean or Caribbean British
       Any other Black background.
     - **Mixed or multiple ethnic groups**
       White or White British and Asian or Asian British
       White or White British and Black African or Black African British
       White or White British and Black Caribbean or Black Caribbean British
       Any other mixed or multiple ethnic background.
     - **White**
       English, Scottish, Welsh, Northern Irish or British
       Gypsy or Irish Traveller
       Irish
       Roma
       Any other white background
       Any other ethnic background
       Not known
       Prefer not to say

   - What is your age category? 18-25, 26-35, 36-45, 46-55, 56-65, 65+
     - 19 and under
     - 20 – 24
     - 25 – 29
     - 30 – 34
     - 35 – 39
     - 40 – 44
     - 45 – 49
     - 50 – 54
     - 55 – 59
     - 60 – 64
     - 65 and over
     - Prefer not to say

   - What is your highest qualification level?
     - No qualifications
     - GCSE or O Level
     - GCE, A level or similar
     - Vocational (BTEC/NVQ/Diploma)
     - Degree level or above
     - Other (please specify):

   - Do you have an impairment, health condition or learning difference that has a substantial or long-term impact on your ability to carry out day-to-day activities?
     - Yes
     - No
     - Prefer not to say.

   - (If yes) please select all of the following that apply to you:
     - Blind or have a visual impairment uncorrected by glasses
     - D/deaf or have a hearing impairment
     - Development condition that you have had since childhood which affects motor, cognitive, social and emotional skills, and speech and language
     - Learning difference such as dyslexia, dyspraxia or AD(H)D
     - Long-term illness or health condition such as cancer, HIV, diabetes, chronic heart disease or epilepsy
     - Mental health condition, challenge or disorder, such as depression, schizophrenia or anxiety Physical impairment (a condition that substantially limits one or more basic physical activities such as walking, climbing stairs, lifting or carrying)
     - Social/communication conditions such as a speech and language impairment or an autistic spectrum condition
     - Prefer not to say
     - An impairment, health condition or learning difference not listed above (specify, if you wish).

   - (i) What region in the UK do you live in?
   - (ii) How would describe the area that you live in? Is it a city, town, suburbs of a city or town, village or rural/remote area?

2. Which topic(s) of previous research have you undertaken? We are keen to explore the views and experiences of a diverse range of people who have previously taken part in qualitative health and social care research where data was collected using remote methods. Do you have any suggestions for how we might reach:
   - Other researchers
   - Research participants who might be interested in participating in our study?
   - Please will you pass on details of the study to other eligible researchers.

3. Would you like us to send you a copy of the interview transcript? If yes, confirm details (email or by post). You will have two weeks to request any changes to the transcript before analysis.

4. Reminder of withdrawal process

5. Discuss voucher

Turn on recording

Part 3: The experience of participating in this interview

3.1. Finally, I would like to invite you to reflect on the experience of participating in this remote interview. Could you please tell me your about your experience of this remote interview?
   - Prompts:

     'What would good/the ideal interview look like from your perspective?

     What needs to be in place to make it good?

     How is this different from a good face-to-face interview'

3.2. Any questions for us?

Thank participant and close interview

QRDC
QUALITATIVE REMOTE DATA COLLECTION

WARWICK
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Appendix 4: Vignettes
4a. Social Care and Disability

A researcher is designing a study that will explore the views and experiences of social care amongst people with various different disabilities. The researcher is considering the use of remote methods to collect qualitative data from this group. They want the project to be as inclusive as possible and invite people with a range of impairments. Their interest in remote methods stems from their wish to have greater geographical reach in their sampling, and consequently a wider pool of potential participants. However, they recognise that using remote methods requires careful planning.

What might the researcher need to consider to assist in the design of this remote study?

Upon reading the QRDC guidance, the researcher considers that remote methods have the capacity to accommodate the needs of people with various types of impairments, disabilities, health conditions and clinical vulnerabilities owing to their flexibility, the removal of the need to travel and accessibility features of remote technologies. However, they are also aware that they need to consider the support needs of the particular participants they will collect data from, not only during the data collection episode/s, but also during recruitment and in the run up to data collection. Upon reading the guidance, the researcher considers that whilst remote data collection methods can support inclusion, they can also pose barriers for, and exclude, others. For example, for people who identify as neurodiverse the physical distance between the researcher and participant, the removal of direct eye contact and the ability to use the chat function (within video-conferencing platforms) can support the person to manage social anxiety and create a safe space for meaningful exchange. For a person with a sensory impairment who relies on lip reading or sign language, however, remote methods can make participation and communication more challenging. The researcher realises that there is a possibility of 'conflicting' support needs for participation in the research, and that this should be taken into account when deciding not only the most appropriate remote technology to use (e.g. telephone, video-conferencing platforms) but also the method of qualitative data collection (e.g. focus groups, group interviews or individual interviews). Indeed, focus groups with participants who have 'conflicting' support needs might not be possible.

The researcher reads that offering use of technologies that allow for asynchronous and text-only responses is an important way to support people managing complex and/or fluctuating disabilities. The researcher wants participants to be able to respond at a time and date most appropriate for them. The guidance prompts the researcher to consider that people who have difficulties with cognitive processing might be overwhelmed by video-conferencing platforms where verbal and textual information (chat function) are concurrent (i.e. frequently co-occur) and neurodivergent participants may similarly be fatigued by the effort needed to interpret the researcher's questions and body language. The researcher reads that 'Zoom fatigue' might set in earlier for this group. With this in mind, they add a break to their data collection plans (where conducted synchronously) and also decide to offer asynchronous text-based methods.

The researcher recognises that asynchronous text-based methods remove visual and auditory cues, and the implications this has for them in terms of being able to identify distress as well as keeping participants engaged. However, they decide that making the research as inclusive as possible is most important. Given that asynchronous data collection can go on for long periods of time, the researcher reads in the QRDC guidance that ending the data collection must be considered from the outset. They decide that they will provide information on this in the participant information sheet that all participants will read. Indeed, the researcher recognises that ending data collection is not always initiated by the researcher. Having clear and easy ways for participants to rearrange, pause or withdraw from the research was highlighted by the QRDC guidance as being particularly important. The researcher reads that "When researching with participants who experience dynamic symptoms, fluctuating energy levels, and sudden changes in circumstances (i.e., unplanned hospital admissions and surgery), withdrawal rates can be high" (Budworth, 2023). They also think about whether consulting with an accessibility expert, or advocacy groups who support people with disabilities, might assist with their research design with this particular group of participants.

Consulting the guidance, the researcher notes that people with learning differences have been digitally marginalised and excluded from research. To include this group, the researcher decides to allocate a proportion of their research budget to put support in place for this group. They realise that this might be used to pay for support workers or personal assistants who may need to be present during data collection (and what this might mean for the data, given that the project focuses on experiences with social care) and also for a license for software such as photosymbols to make study documentation more accessible. They recognise that resources need to be allocated to the creation of 'easy read' copies of study documentation and short videos explaining the research. The researcher ringfences time, prior to data collection, to ensure that participants and their supporters are able to use the intended technology.

The researcher also reads that it is important to consider the accessibility features of technologies that could be used to involve disabled people in research, as well as the equipment and skills that are essential to navigate them. Due to socioeconomic and political disadvantages, disabled people are more likely than other populations to be digitally excluded. The QRDC guidance suggests that providing equipment and supporting participants who are unfamiliar with the technology or platform can contribute to overcoming this, as well as using participants' preferred communication methods where possible.

Whilst wanting to consider a wide range of needs, and how these might impact the experience of remote data collection for participants, the QRDC guidance reminds the researcher that they should consider intersectionality and that a disability or health condition should not be viewed as the 'master category' of identity. Rather, they recognise the value of considering its interface with other aspects of the participants' identities, as well as their socioeconomic, cultural and environmental circumstances. They note from the guidance that underserved populations are more likely to mistrust remote methods of data collection and consider implementing a hybrid design so that face-to-face data collection can also be an option.

Tracing their decisions through the QRDC guidance, the researcher next considers that confidentiality and privacy are of particular concern when doing research with people with disabilities. Having a support worker in the room (or one who can access the generated data on the participant's machine), or an interpreter present (e.g. British Sign Language), can mean that there are limits on the confidentiality that researchers can offer participants. There is also a possibility that these third parties can 'hijack' the data collection by speaking on behalf of the participant, or otherwise involve themselves in the data collection. The QRDC guidance highlights to the researcher that when they come to use remote methods, it might not be possible to see whether the participant is alone or not, or to control who else might access the data at the participant's end. Indeed, after video-conferencing, recordings are typically accessible to both parties whereas when research is conducted face-to-face, the recording usually stays with the researcher only. In a project focusing on social care, the researcher becomes aware that there is a possibility that a support worker could overhear, influence, or otherwise access the data and that this needs to be carefully managed if possible, for example, reverting to text only data collection, or using text chat as an adjunct to another method. This can allow participants to say things they may feel uncomfortable to say out loud, giving them greater agency to control the direction of the interaction

Following the guidance, the researcher thinks about how the use of remote methods can go some way in levelling power differentials present in qualitative data collection. The guidance highlights the various ways this can occur. Firstly, it removes the need to be physically in someone else's space, which, in face-to-face data collection has typically been chosen and arranged by the researcher. In addition, the participant might be able to see inside the researcher's personal space (video-conferencing), which can have an equalising effect. Disabled people may choose to conceal their disability in remote interviews and therefore limit how much information the interviewer has about it, which also influences power relations. Research participants can decide whether their cameras are turned off or on (in the case of video-conferencing platforms), as well as what is in frame. The researcher also realises that certain video-conferencing platforms allow the participant to 'block' the researcher following data collection to ensure no further contact, which is empowering for participants. Using blurred backgrounds can also restrict how much 'silent data' (e.g. environmental) data the researcher has access to.

The researcher feels it is particularly important for them to create a safe space for participants within the data collection process, and that rapport is a key part of this. The QRDC guidance suggests that it is important to consider the ways that data collection can be more challenging in remote contexts: e.g. developing rapport in text-only exchanges or using methods where there are no visual or audio cues that the researcher had previously relied on (Harvey et al., 2023). The guidance highlights that despite these challenges, similar levels of rapport can be built remotely as if it was face-to-face (Harvey et al., 2023; Boland et al., 2022, Weller, 2017, Engward et al., 2022, Hanna and Mwale, 2017, Khan and MacEachen, 2022) albeit this rapport can take longer to develop in order for it to be sufficient for gaining in-depth data (Gibson, 2020). With this in mind, the researcher decides to include the option of introductory meetings with participants (using video or face-to-face) in their research protocol, before moving into text-based communication to support and nurture rapport.

By drawing on the wider qualitative research literature, the researcher understands that they need to consider their own positionality and social characteristics, and the way these might have an impact on the research process. In this literature, it has been argued that matched characteristics (e.g. ethnicity, gender) between researcher and participant can facilitate rapport-building and the development of a 'shorthand' as the participant interprets the researcher as an 'insider'. However, the literature also indicates that the inverse can also be true- being perceived as an 'outsider' can mean that more detail and explanation is provided (Asselin, 2003). Returning to the QRDC guidance, the researcher considers how it can be harder for both researchers and participants to 'read' each other's physical markers of social identity when research is conducted remotely (e.g. disability aids being out of frame, no visual data). They also recognise that remote methods can mean that both researcher and participant make active decisions about how much information is disclosed to the other. The guidance suggests that this can be experienced as an ethical quandary if the researcher has not disclosed aspects of their own identity that they feel might influence what the participant discloses (Brown & Boardman, 2011). This makes the researcher consider just how important reflexivity is in remote contexts.

Finally, the researcher plans to offer participants incentives for taking part in their research. They want to acknowledge the participants' time contributions, and the value of their accounts, particularly as disabled people have to overcome additional barriers to participate in research. Upon reading the QRDC guidance, the researcher realises that receiving payment – whether for remote or face-to-face participation - could affect entitlement to social security benefits, and therefore decides to ask participants before participating about whether or how they would like to receive this contribution. Indeed, vouchers can be viewed as equivalent to cash (NIHR, 2024).

4b. Shared decision-making in maternity care

A research team is designing a study to improve shared decision-making in maternity care in the UK as a strategy for reducing inequities in maternal health. They recognise the importance of actively listening to and learning from the lived experience of women and birthing people from black, minority ethnic and immigrant communities, as the communities that are most disproportionately affected by poor maternal health and outcomes.

What might the researchers need to consider when designing the qualitative element of this study?

To begin with, the team considers that black, minority ethnic and immigrant communities are under-represented in medical and health research (Smart and Harrison, 2017, Ahmed et al., 2022). Furthermore, they recognise that trust in research and researchers is shaped by a range of factors including legacies of abuse in the name of research and experiences of discrimination perpetuated by institutions, including healthcare (Ahmed et al., 2022).

Preparing for remote data collection

The team reads the QRDC guidance and realise that whilst remote methods can heighten inclusivity, the team may need to do some 'groundwork' first. For example, they need a good understanding of the setting and relationships that must be built with relevant community organisations, representatives and individuals. They recognise it is vital to understand the context, perspectives and needs of community members in relation to data collection. They consider that it may take some time to build the high-quality relationships that enable a researcher to understand a community perspective.

The team decides it may be helpful to get to know members of the community in a non-research setting first, such as through attendance at community events (Ahmed et al., 2022). Trusted individuals in the community can be important facilitators of research but the team realises that they also need to think about how to access community members who do not typically engage with community centres and events. They consult the evidence and consider that community radio stations can be an important medium for outreach (Bashir, 2023). Reading the QRDC guidance, they are reminded that it is vital to make clear the benefits of the research to the community so that a sense of reciprocity is created and the research study will not simply be extractive without clear benefit.

The team ultimately decide that their preparatory work should include co-producing the study design with communities, taking into account access to remote communication technologies, their routine use (or not) and related issues specific to the communities they want to reach. They acknowledge there will be differences within and between communities in their use of and attitudes to communication technologies. For example, the digital divide is most marked in older minority ethnic adults (Poole et al., 2021)

Relationship-building

The process of building community relationships is critical to setting the stage for data collection. Face-to-face contact during recruitment can start to build rapport (Boland et al., 2022), whereas participants may be less responsive when researchers 'parachute in' – either remotely or in-person (Tarrant et al., 2023, Archer-Kuhn et al., 2022, Douedari et al., 2021). The team reads that during the data collection process itself, similar levels of rapport can be built with remote and in-person methods (Harvey et al., 2023, Boland et al., 2022, Weller, 2017, Engward et al., 2022, Hanna and Mwale, 2017, Khan and MacEachen, 2022) including for underserved populations (Harvey et al., 2023, Jenner and Myers, 2019). However, the guidance points out that rapport may be less easily achieved without visual cues, for example with audio-only methods (Novick, 2008).

The team notes that participants from marginalised populations often feel more comfortable bringing a trusted supporter to their interview (Piacentini et al., 2022). They consider that these third parties can sometimes 'hijack' or otherwise derail interviews (Prior and Lachover, 2023). In particular, the presence of an interpreter can make rapport-building challenging (Piacentini et al., 2022) (Chiumento et al., 2018). The QRDC guidance alerts them that online interviews can sometimes be viewed as less formal and more relaxed than face-to-face interviews, reducing the power of the interviewer (Prior and Lachover, 2023). They think about ways that remote data collection can reduce power differences by affording more decision-making opportunities to participants (Piacentini et al., 2022) for example, by giving them more choice over where they take part, and to what extent they are visible (Hanna and Mwale, 2017; Prior and Lachover, 2023, Ślęzak, 2023).

Through reading the QRDC guidance, the team reflect that engaging underserved communities with research requires particular attention to power dynamics. A whole range of factors, including gender, class, age, sexual identity, disability, ethnicity, and other social positions/locations intersect to produce power dynamics (Prior and Lachover, 2023). The team realises that it is also important to address the needs, anxieties and expectations that community members may have around privacy for data collection.

Trauma-informed approaches to remote data collection

Empowering participants is particularly important in the project. Some qualitative health researchers who work with black, minority ethnic and immigrant communities has adopted a trauma-informed approach to data collection, in recognition of the racism and discrimination experienced in the health care system (Birthrights, 2022). Trauma-informed approaches to research involve addressing the adversity and trauma that underpins the lives of some research participants, regardless of the topic of the research, improving the accessibility and acceptability of studies for diverse participants (Edelman, 2022) and supporting participants' capacity for choice and control in the research encounter (Alessi and Kahn, 2023). The team decide that remote methods may provide some resources for this approach and are now considering how this could be integrated into their study design and ongoing research practice.

4c. Remote methods and fieldnotes in a study of health management in resource constrained settings

A postdoctoral early career researcher is planning an interview study with people living in very resource constrained settings about managing their health. Participants include adults and children. Remote data collection will overcome barriers to travel for the researcher. However, the researcher is concerned that remote data collection will not give them the depth of understanding of participants whose lives are likely to be very different from their own, as they will not encounter them in their chosen physical space. They are concerned that they will have little to write in the fieldnotes that might enhance the interview data.

From a highly cited guide to fieldnotes based on a review of published literature (Phillippi and Lauderdale 2018) they learn that fieldnotes taken during qualitative data collection, such as interviews, have the following functions:

- “Prompt researcher(s) to closely observe environment and interactions
- Supplement language-focused data
- Document sights, smells, sounds of physical environment, and researcher impressions shortly after they occur
- Encourage researcher reflection and identification of bias
- Facilitate preliminary coding and iterative study design
- Increase rigor and trustworthiness
- Provide essential context to inform data analysis” (Phillippi and Lauderdale 2018)

The same guide suggests fieldnotes are used to provide contextual information for the study as a whole and for individual interviews. Contextual information for the full study includes geographical features, demographics of the study locality such as age, education, ethnicity, types of paid/unpaid work and religion of community members, alongside societal pressures within the locality such as stability of local economy, tensions in the community, local events, and cost of living including food and healthcare (Phillippi and Lauderdale, 2018). Contextual information for individual interviews includes the location of the interview, relevant features of the interview room and where the participant(s) sat, any people present and why they were there, the appearance of the participant including clothing and non-verbal behaviours. Fieldnotes can also document how an interview proceeds and adaptations are made; and provide critical reflections on the interview and early thoughts on analysis (Phillippi and Lauderdale, 2018).

What might the researcher need to consider when designing this remote study?

After reading the QRDC guidance, the researcher notices that, by prompting the researcher to observe and reflect, many functions of fieldnotes can be achieved in the same way for remote and face-to-face data collection. If they use video-conferencing, they realise they will be able to pick up some non-verbal behaviours and will be able to see facial expressions which can help to gauge the response to their question, for example distress or excitement. Audio-only may encourage the interviewee and researcher to verbalise what might otherwise be assumed.

They note that information about the study context is mostly available from publicly available sources. If necessary, they realise they could supplement the information with a visit to the study locality. So, the researcher creates a list of what might be missing from fieldnotes if they undertake their interviews remotely using video conferencing:

- Sights except those visible via a video link including observation of where interviewee is located and participant appearance
- Smells
- Sounds except those picked up by a phone/microphone.

Importantly, the researcher realises that they can ask the interviewee questions that will provide data on the interviewee’s perception of their location (including what is good about it and what is not e.g. noise, bad smells), how they feel (generally or when asked a particular question) and what they think about the questions asked by the researcher. Arguably, this is more valuable data than the researcher’s observations as researchers choose to observe some things and not others, filter what is observable and potentially misinterpret what they see (Mulhall, 2003).

On further reading of the QRDC guidance the researcher realises there are important methodological issues to consider when weighing up the advantages and disadvantages of being able to observe the interviewee and where they are.

Inclusivity

The QRDC guidance suggests there is variation in how interviewees respond in face-to-face/remote interviews. Some participants may provide more data in face-to-face interviews but for others, remote data collection may reduce the pressure of having the researcher present. This may be, for example, not feeling they need to tidy their house for a home interview. Some interviewees may not want the researcher to see their living circumstances. This may particularly be the case for marginalised communities, or in instances where the topic is sensitive. MORE INFORMATION For interviewees who find bodily cues hard to read or who find being physically near a stranger difficult, remote data collection methods can be more comfortable.

Power differential between the researcher and the interviewee

Interviewees have more control over data collection process when it is remote, including what they choose to reveal. MORE INFORMATION If the interviewee enables it, the place where the interviewee is located will be visible, at least in part. However, the interviewee controls how their camera is positioned and whether it is on or off, and so what is visible to the researcher. Asynchronous text-based data collection suits some people more than synchronous interviews and can flatten power-differentials. Interviewees may use emojis, animations, photos, videos which enhance the text data and are chosen by the participant. Interviewees may choose to show the researcher things in their environment or give them a tour of their home or locality via remote communication channels. However, the researcher needs to consider how they might guide vulnerable participants such as children as to what they reveal.

Reciprocity

The researcher realises that they will need to think carefully about their own background, camera position and interview and the partial insight this may give the participant into where and 'who' they are. For example, will they be running the interview from an organisational or home office? Will they have a blurred or virtual background? Would they be prepared to show their environment as part of building rapport, 'humanising' themselves and reassuring the participant of their privacy?

The immediate environment

What an interviewee says during an interview may be influenced by what is happening in their immediate environment such as other people being present or interruptions from the doorbell and children. It is likely to be clearer to the researcher what is happening if they are physically present. However, the researcher realises that they can sensitively ask the interviewee about what is happening if they appear distracted or hesitant, or if other people can be seen or heard.

The QRDC guidance prompts the researcher to think about possible distractions from what is happening onscreen in the case of video interviews. Unlike when meeting in-person, both the participant and the researcher will be able to see themselves, as well as each other, so the researcher may need to check with the participant about this. They may also need to check in with themselves in their research diary, and with their research team and mentors: the added visual prompts (during the data collection and in viewing any video-recording) may be used to support their own reflexivity about interviewing style and approach, and the research dynamic with participants. MORE INFORMATION

Deciding a way forward

The researcher weighs up the evidence and decides not to include fieldnotes as data collection in the ethics application. The researcher reviews their interview schedule to ensure they ask relevant questions about the interviewee's context. Whether they undertake an interview face-to-face or remotely, they decide that if they notice something about the interviewee or about their environment that the participant does not mention spontaneously, they will sensitively ask about it as part of the interview. If something happens just before or after the interview formally starts or finishes, they will ask the interviewee about it, and check whether they are happy for their response to be included as data.

In addition, the researcher realises that they need to consider other sections of the QRDC guidance. Guided by the 'researcher prompts' at the end of each chapter, these include: how they will ensure access to digital communication for their participants – will they pay for data for internet connection, can they arrange for the participant to go to a community hub where there is good connectivity, will participants manage the technology? Will the participant be able to find a safe space to talk about their health, which could include sensitive issues, and will they trust the remote researcher? Moving into the chapters, the researcher reflects further on these questions in the context of the evidence-based guidance and is able to trace studies that have addressed similar issues which in turn influence their final design.

Appendix 5: Public Reference Group Members

Emily Lam

As an elderly ethnic minority person my experience during lockdown led me to reflect on how important it is for me to stay connected with agencies in society. Decreasing mobility and living in a rural area can be my barriers to taking part in civil life, though my language and digital skills are facilitators. To me the QRDC project is timely and vital for examining remote qualitative research methods to understand who benefits and who doesn't. Appropriate measures devised, such as upskilling and options, may then ensure benefits can be more equitably distributed across different people groups- those digitally capable and those incapable. Producing good practice guidance for researchers and policy makers involved in conducting remote qualitative data collection will likely increase their chance of achieving fairness for everybody.

Rashmi Kumar

I am full-time Carer for elderly family member with long-term multiple conditions, cardiovascular disease, Chronic obstructive pulmonary disease (COPD) and now Dementia. I am responsible for her self-manage medical, health and care needs.
I am from South Asian background living in area with health, cultural and socio-economic diverse communities, many living with multiple health and care challenges and deprivation.

Cecily Henry

I live in the East midlands. I have been a public contributor since 2018 with my first role as a contributor with the Research Design Service East Midlands (of which I am still thoroughly enjoying). I continue to support a range of organisations in both co-applicant, advisory panel and patient and carer roles. With a background specialising in Equality Diversity and Inclusion in varying sectors spanning over 15 years, I am committed to supporting innovative ways to ensure a diverse range of voices are heard in research processes. With my Sociological background, the project caught my attention in terms of my interest in factors impacting on the ease, appropriateness, reliability and validity of research undertaken (especially when we are thinking over tackling health inequalities).

Samina Begum

I am a carer for my mum from Yorkshire, who has a number of health conditions. As someone whose first language is not English having her voice heard in her health conditions, including the treatments and how it impacts on her quality of life. Without her voice research would not represent her and therefore impact on treatments for marginalised communities.

Debra Smith

I am white British and have a number of long-term health conditions both physical and mental and am substantially disabled. I have done a lot of voluntary work in my community in South Warwickshire and have been Involved In patient and public Involvement work in the health and social care sector and research in these areas for over 13 years and my work spans the UK.

Pam Smith

I live in a rural part of Staffordshire. I am interested in all things health related, with my key topics being cancer particularly cancer survivorship, dementia and palliative care. I suppose because that is what I have had direct involvement in. Other than this I am a keen gardener and WI member.

Clara Martins de Barros

I am an autistic woman with Attention Deficit Hyperactivity Disorder (ADHD) I come from a rich and diverse heritage, born in the vibrant city of London but have lived in different countries throughout my upbringing. This mosaic of experiences has shaped me into the person I am today, with a unique perspective on the world and a passion for making a difference in the realm of health and medicine. My journey into the world of Patient and Public Involvement (PPI) began with a rather negative experience with a clinician, which left me feeling unheard and devalued. It was a difficult time, but in a twist of fate, I met a researcher from King's College who introduced me to the concept of PPI. This serendipitous meeting was the catalyst that transformed my frustration into a newfound purpose. I have since been involved in many different projects and have also embarked on an international fellowship in the Patient Expert Training Programme.

Rebecca Harmston

I am a trained research scientist with a background in biochemistry and molecular biology and am interested in new scientific developments in health technology. I'm an autistic disabled adult living with long-term medical conditions so am aware of the issues affecting patients accessing health care. I am also the main carer for a child with autism. I have worked many different companies and research organisations on very diverse health-related projects and my patient involvement experience includes ethics, guidance development, quality standards, steering groups, diagnostics, technology appraisal, focus groups and reviewing.

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Appendix 6: Consensus Conference Participants

Samina Begum
(Public Reference Group)

Petra Boynton
(Social Psychologist and Research Methods Specialist)

Abinaya Chandrasekar
(Doctoral Researcher, London School of Hygiene and Tropical Medicine)

Sigrún Clark
(Researcher, University College London)

Paige Clarke-Jeffers
(Researcher, Birmingham City University)

Jennifer Creese
(Researcher University of Leicester)

Natalie Edelman
(Researcher, Brighton and Sussex Medical School)

Emma Good
(Researcher, University of Leicester)

Rebecca Harmston
(Public Reference Group)

Cecily Henry
(Public Reference Group)

Marnie Howlett
(Researcher, University of Oxford)

Helen Kara
(Independent Researcher)

Rashmi Kumar
(Public Reference Group)

Emily Lam
(Public Reference Group)

Kirsty Liddiard
(Researcher, University of Sheffield)

Rose Lindsey
(Researcher, University of Southampton/ NCRM)

Clara Martins de Barros
(Public Reference Group)

Tracey McConnell
(Researcher, Queen's University Belfast)

Magdalena Mikulak
(Researcher, Lancaster University)

Shadreck Mwale
(Researcher University of West London)

Jane Noyes
(Researcher, Bangor University, MRC representative)

Kasia Patynowska
(Research Nurse, Marie Curie UK)

Claire Powell
(Researcher, University College London/Qualitative Health Research Network)

Azra Rasool
(Refugee Alliance UK)

Janet Salmons
(Independent Researcher, Scholar and Methodologist)

Debra Smith
(Public Reference Group)

Pam Smith
(Public Reference Group)

Jackie van Dael
(Researcher, University of Oxford)

Susie Weller
(Researcher, University of Oxford)

Emma Wiley
(Researcher, University of Oxford)

Lauren Wilkinson
(Researcher, University of Warwick)

Fatima Zakia
(Community Connexions Lead, Birmingham)

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Ethics

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