

The impact of Covid-19 on research methods and approaches

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Question

- *In what ways has Covid-19 impacted research methods and approaches?*
- *What are the challenges and are there examples of any innovative solutions?*

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The Covid Collective helpdesk service provides brief summaries of current research, evidence, and lessons learned. Helpdesk reports are not rigorous or systematic reviews; they are intended to provide an introduction to the most important evidence related to a research question. They draw on a rapid desk-based review of published literature and consultation with subject specialists.

This Helpdesk report was commissioned through the Covid Collective based at the Institute of Development Studies (IDS) and is funded by the UK Foreign Commonwealth and Development Office (FCDO) The Collective brings together the expertise of, UK and Southern based research partner organisations and offers a rapid social science research response to inform decision-making on some of the most pressing Covid-19 related development challenges. The views and opinions expressed do not necessarily reflect those of FCDO, the UK Government, or any other contributing organisation. For further information, please contact covidcollective@ids.ac.uk

1. Summary

The Covid-19 pandemic, and measures to contain the spread of the virus, such as border closures, quarantine requirements, mandatory PCR (Polymerase Chain Reaction) tests, curfews, and social distancing requirements, have had a significant impact on research methods and approaches. Most of the available literature assumes that remote data collection is the only viable means of collecting primary data during the pandemic, so that is the focus of this report. While there is an extensive discussion of challenges associated with undertaking primary data collection during this time, there are also several commentaries and opinion pieces that highlight the opportunities and positive aspects of remote data collection.

Challenges highlighted include:

- **Accessibility** – this is particularly challenging as researchers tend only to have access to respondents who have mobile phone/internet access, thereby excluding the most vulnerable.
- **Provision of incentives** – providing incentives remotely can be challenging, but this is necessary given the financial hardship that many individuals may be facing as a result of the pandemic. Disbursement of funds can take place via mobile money services, such as M-Pesa, or via reloadable debit cards, as well as in the form of airtime.
- **Informed consent** – there are numerous ways in which informed consent can be obtained remotely, including via video message.
- **Ethical challenges** – when undertaking remote data collection, it is hard for the researcher to know whether the respondent has privacy when answering questions. It can also be uncomfortable for people to discuss sensitive issues, such as SGBV (Sexual and Gender-based Violence), via the telephone, and in the worst case can lead to victims of violence being subject to even greater abuse.
- **Engagement** – it can be difficult for respondents to remain engaged for extended periods of time when participating in telephone interviews. It is, therefore, necessary to keep questionnaires short when undertaking surveys remotely.

Opportunities presented by the Covid-19 pandemic include:

- **Empowering researchers in the Global South** – the devolution of research activities to local researchers has been necessary and is in accordance with the principles of participatory research.
- **Shift in power dynamics among respondents** – researchers have noted that respondents who would perhaps have been less vocal during in-person group discussions, were sometimes more willing to speak up in Zoom meetings, or to engage via chat.
- **Closing the digital divide** – there is an increased need for internet access in the Global South due to the shift to online meetings, workshops and remote data collection. Countries such as Ghana and Kenya have sought to increase internet access to meet new demand.
- **Climate friendly** – less international travel by researchers means they have a reduced carbon footprint.

Because the onset of the pandemic is relatively recent, there is a lack of peer-reviewed literature and rigorous evidence on the impact of Covid-19 on research methods and approaches. There is, however, a large volume of commentaries and opinion pieces, and various blog posts documenting lessons learned. While many of these are from reputable sources including established research institutes, NGOs and think tanks, as well as universities, the evidence provided is anecdotal. There is significant coverage of the gendered impact of Covid-19 on research methods and approaches, in particular in relation to the ethical issues surrounding the discussion of sensitive issues such as SGBV via the telephone. However, the searches undertaken for this report did not uncover any literature specifically addressing how remote research approaches and methods might affect researchers' ability to engage with persons with disabilities.

2. Impact on research methods and approaches

General challenges

The Covid-19 pandemic has had a significant impact on researchers' ability to undertake fieldwork, both due to the risk of contracting the virus, and due to challenges associated with containment measures.

Third-party data collection

A blog by a researcher leading a project for CARE (Cooperative for Assistance and Relief Everywhere) in Kenya describes the approach taken by international researchers who have been unable to travel due to flight restrictions. The researchers trained data collection teams remotely. They also supervised the enumerators closely, calling them on each day of the data collection, and asking them to keep a field diary reflecting upon their experiences. They also asked enumerators to use voice recorders, and for transcriptions to be translated verbatim into English, so the international researchers would be able to code and analyse the data later. Besides, they ensured the researchers understood their ethics guidelines and how to use informed consent.¹ However, while third-party data collection can have many benefits, local researchers will still be at risk of contracting Covid-19. This means that preventative measures, such as social distancing, handwashing and temperature checks should be implemented to ensure their safety.²

Accessibility

A recurring theme in the existing literature is how to access those who do not have a mobile phone or internet access when undertaking remote data collection. Commentators also note that this problem has a gender dimension, in that women are often less likely to own a mobile phone than men. This problem can be

¹ <http://www.includovate.com/dr-bikketi-on-adapting-to-Covid-19-in-kenya/>

² <https://devtechsys.com/insights/2020/04/15/evaluations-in-the-age-of-Covid-19/>

exacerbated in countries where authoritarian governments restrict internet access.³ A blog post published by IDS (Institute of Development Studies) notes that ‘it is a challenge to find digital technology that is accessible to people with limited broadband but meet GDPR (General Data Protection Regulation) compliance requirements.’ It states that while WhatsApp is accessible, it is not GDPR compliant. Moreover, SMS reportedly has a wider reach but is more limited in its functionality and is not encrypted.⁴ In addition, challenges around access to mobile phones and lack of electricity may also present difficulties, as mobile phones require electricity to charge.⁵

For a study in South Africa, researchers collected multiple numbers for each participant to increase their chances of reaching them. This included participants’ current number(s), a family member’s phone number, and a friend’s phone number. They also advise putting in place multiple measures to avoid data-entry errors (e.g., double-entry, length constraints, etc.), as these contact details are so important. Researchers working on this project also collected email addresses but found that email wasn’t an effective channel for communication.⁶ Another option presented by researchers is to collect different contact channels. For example, a survey in Indonesia collected respondents’ WhatsApp number, Line, Facebook, WeChat, IMO, or Skype ID. In this case, researchers found that most respondents preferred WhatsApp or Skype calls.⁷

Provision of incentives

Several blog posts discuss the issue of incentives, especially given that many people have lost their source of income as a result of the pandemic. A blog posted by 3ie suggests calculating forgone earnings or opportunity costs, as well as costs of re-charging the phone, maintenance, and usage to determine the amount respondents should receive, as well as paying for their time.⁸ Researchers and practitioners note that providing incentives to respondents can be challenging, or even impossible when undertaking remote data collection. While mobile money services, such as M-Pesa, are a good way of disbursing compensation, not everybody has access to a mobile phone.⁹ Saberi finds that reloadable debit cards have been used to provide incentives with great success. The cards can be sent to research participants and loaded once the research participants have confirmed receipt. Funds can also be transferred to another card if a card is lost or stolen (2020, p. 2233). Other researchers

³ <https://www.ids.ac.uk/opinions/Covid-19-reflections-for-participatory-research/>

⁴ <https://www.ids.ac.uk/opinions/Covid-19-reflections-for-participatory-research/>

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⁶ <https://www.gage.odi.org/multimedia/data-collection-in-Covid-19-restrictions/>

⁷ <https://www.povertyactionlab.org/blog/3-20-20/best-practices-conducting-phone-surveys>

⁸ <https://www.3ieimpact.org/blogs/phone-surveys-developing-countries-need-abundance-caution>

⁹ <https://www.3ieimpact.org/blogs/phone-surveys-developing-countries-need-abundance-caution>

also suggest providing airtime, either electronically or by reading the digits of a prepaid card to the participants, at the end of the interview.¹⁰

Informed consent

Another challenge is how to get informed consent from research participants. An LSE (London School of Economics) Fellow, conducting participatory research with women in Colombia, used video dialogues to obtain consent. She provided the project information and all ethical information through a short video, and then the participating women shared short videos with her in which they agreed to participate in the research and confirmed that they understood the project and the ethical information she provided.¹¹

J-PAL's (Abdul Latif Jameel Poverty Action Lab) position on informed consent via telephone is that the informed consent script should be short and use simple, clear language. The script should include the purpose of the call, who is calling (organisation and individual), confidentiality, and duration of the survey. They also suggest that the script be piloted internally over the phone, to get a sense of the length and whether it is easily understood, noting that the script may need to be revised before implementation. Further, they state that the survey protocol should log when verbal consent was given. The survey should not continue unless consent was explicitly confirmed by the enumerator. Consent should be given by clearly speaking a short phrase, such as "Yes, I agree".¹²

Ethical considerations

When conducting remote survey interviews, it is hard for the interviewer to know whether the respondents have privacy during the interview process, especially as more people are present at home than usual due to the pandemic restrictions. In-person interaction can also help respondents feel comfortable speaking about sensitive subjects, like sexuality or politics. In a remote survey conducted by ODI (Overseas Development Institute) in Jordan, the older cohort of adolescents aged 15-19 were asked questions about sexual violence and marriage. A large number of these surveys were incomplete as respondents dropped the phone call or refused to continue participating after these questions were asked.¹³

A blog post published by 3ie highlights the need to be extra careful about keeping women on the phone for a long time, as there is a risk that they would be subject to increased domestic violence as a result of their prolonged interaction on the phone due to participating in a survey.¹⁴ A UN Women paper focusing specifically on the

¹⁰ <https://www.povertyactionlab.org/blog/3-20-20/best-practices-conducting-phone-surveys>

¹¹ <https://blogs.lse.ac.uk/internationaldevelopment/2020/05/22/conducting-transnational-participatory-research-with-women-during-Covid-19-remotely-an-impossibility/>

¹² <https://www.povertyactionlab.org/blog/3-20-20/best-practices-conducting-phone-surveys>

¹³ <https://www.gage.odi.org/multimedia/data-collection-in-Covid-19-restrictions/>

¹⁴ <https://www.3ieimpact.org/blogs/phone-surveys-developing-countries-need-abundance-caution>

risks of researching VAWG (Violence Against Women and Girls) remotely, also highlights the risk of a perpetrator finding out that a woman is sharing her experiences and the chance that she will be subject to more severe abuse as a result (UN Women, 2020, p. 2).

One blog post notes that poor households often share mobile phones, and that not everybody will have equal access to the phone. The author observes that younger males are most likely to be the ones who know how to operate phones and they will often 'control' conversations. This can lead to biases when conducting a remote survey.¹⁵

There is a consensus in much of the existing literature that researchers should consider alternative sources of data before embarking on remote primary data collection with community members, in particular if respondents may be at risk. This is due to the potential of doing harm, especially in the case of victims of SGBV, as outlined above. Some organisations also highlight the increased risk of data being lost or stolen when enumerators are working from home.¹⁶

Surveys

The literature provides a number of options for conducting surveys remotely. It also contains options for when field research is feasible and social distancing is required.

- **Text messaging surveys:** Surveys are sent one message at a time, which makes it possible for respondents to answer at their convenience. However, this type of survey is best suited to short questionnaires. Moreover, it can only be used with literate participants. Text messaging surveys have limitations surrounding both overall questionnaire length and individual question length, and studies have shown they do not capture question types such as “select all that apply” and other modes.¹⁷
- **Computer-assisted telephone interviews (CATI):** Trained interviewers conduct live calls. CATI reportedly most closely resembles face-to-face interviews as it allows for longer interviews, follow-ups by the interviewer, and reaching illiterate populations. As a result, it has become the preferred method for those transitioning projects from in-person methods. CATI is currently being used by a range of organisations for studies related to M & E. While CATI can support longer questionnaires than text messaging and interactive voice response surveys, it needs to be able to be administered over a voice call, without the use of visual aids.¹⁸

¹⁵ <https://www.3ieimpact.org/blogs/phone-surveys-developing-countries-need-abundance-caution>

¹⁶ <https://www.povertyactionlab.org/blog/3-20-20/best-practices-conducting-phone-surveys>

¹⁷ <https://www.devex.com/news/sponsored/opinion-how-to-adapt-to-remote-research-methods-in-rapidly-changing-circumstances-98241>

¹⁸ <https://www.devex.com/news/sponsored/opinion-how-to-adapt-to-remote-research-methods-in-rapidly-changing-circumstances-98241>

- **Interactive voice response (IVR):** This uses a pre-recorded voice system to ask questions.¹⁹
- **Multimodal platforms:** These can support many different question types, along with complex routing options. However, questionnaires should be designed with inputs from mobile research experts.²⁰

Sampling

One of the challenges identified is how to identify survey participants remotely. If organisations have their own lists of programme participants and corresponding phone numbers, these can be used. However, success rates vary. For voice call surveys, many companies use random digit dialling methods to generate lists of phone numbers. This involves setting the relevant prefixes (e.g., country code), then randomly generating numbers to call.²¹ As an alternative to random digit dialling, researchers also suggest asking the village chief/elder for phone numbers.²²

Respondent engagement

Researchers from ODI's GAGE (Gender and Adolescence: Global Evidence) programme, undertaking remote research in Jordan, found that respondent engagement is difficult to maintain. Adolescents aged 10-14, in particular, found it difficult to stay engaged during remote interviews. Initially, the surveys that were being implemented for this project were designed to take from forty-five minutes to an hour. However, due to the challenges related to keeping respondents engaged, the surveys were reduced to between thirty and forty-five minutes. Despite this, the researchers found that the completion rate for face-to-face interviews (99.7 per cent), conducted prior to Covid-19 restrictions, was higher than the completion rate for remote interviews (93.6 per cent).²³

Validation workshops

For the CARE project discussed above, the validation workshop was to take place via Zoom with break out groups and real-time polling using Poll Everywhere to see how many participants agree, and to what extent, with the findings and recommendations.²⁴

¹⁹ <https://www.devex.com/news/sponsored/opinion-how-to-adapt-to-remote-research-methods-in-rapidly-changing-circumstances-98241>

²⁰ <https://www.devex.com/news/sponsored/opinion-how-to-adapt-to-remote-research-methods-in-rapidly-changing-circumstances-98241>

²¹ <https://www.devex.com/news/sponsored/opinion-how-to-adapt-to-remote-research-methods-in-rapidly-changing-circumstances-98241>

²² <https://www.povertyactionlab.org/blog/3-20-20/best-practices-conducting-phone-surveys>

²³ <https://www.gage.odi.org/multimedia/data-collection-in-Covid-19-restrictions/>

²⁴ <http://www.includovate.com/dr-bikketi-on-adapting-to-Covid-19-in-kenya/>

Key Informant Interviews (KIIs)

The existing literature provides numerous options for undertaking KIIs. The advice provided overlaps significantly with the advice for conducting phone interviews to undertake a remote survey. Researchers note that one should allow a little more time than usual for each interview, to build up a repertoire with the respondent, as this is harder to achieve via the telephone than in person.

Focus Group Discussions (FGDs)

A researcher undertaking a project for CARE in Kenya notes that while some elements of fieldwork were possible, social distancing rules, whereby no more than five people were permitted to gather at any one time, made it impossible to undertake FGDs. For this particular project, remote FGDs were also impossible because most of the farmers in the study did not have smartphones.²⁵

Longitudinal Research

Those undertaking longitudinal research have encountered significant challenges in relation to Covid-19 related restrictions serving as an obstacle to the continuation of studies, which had already commenced. A blog post by the Centre for International Development and Training at the University of Wolverhampton discusses how they adapted an ongoing longitudinal study on school drop-out in Zimbabwe. The study was tracking over 3000 students, interviewing the children, their teachers and caregivers. The research team were faced with the challenge of how to gather data from such a large number of people, considering the challenges associated with social distancing and not being able to travel internationally.

As UNICEF, who had commissioned the research, were not willing to accept any delays in the finalisation of the project, researchers adapted the methodology to undertake phone interviews.

Initially, these were only conducted with headteachers and caregivers, as there were concerns about students having the privacy needed for phone interviews. However, as schools in Zimbabwe remained closed, phone interviews also began with students. These were considered to have been successful and students helped each other participate by sharing phones.

As the Ministry of Education was not able to undertake verification of the findings via school visits the research team provided the details and phone numbers of those interviewed to the Ministry, so that they could make random phone calls to verify the research.

²⁵ <http://www.includovate.com/dr-bikketi-on-adapting-to-Covid-19-in-kenya/>

3. Opportunities

While the existing literature presents a lot of challenges associated with data collection during the pandemic, the situation also presents opportunities. According to Saberi:

'aligning research activities with remotely-conducted research methodology has the potential benefits of reducing time and cost for conducting the study, improving ease of participation for many individuals, enhancing the generalizability of findings, and increasing the speed of publication of study findings, all while preventing potential viral transmissions to research participants or staff' (2020, p. 2233).

Empowerment

Researchers have found that in some Zoom sessions less-senior participants, who would have been less likely to actively participate in in-person discussions, were more vocal. Moreover, the chat function enables participants to raise issues 'that challenge the main narrative.'²⁶ Researchers also found that leaving the comment space open after the formal end of session, and allowing anonymous comments, gives some people time to think about what has been said and a space to share opinions that they would not have felt comfortable voicing in front of more senior participants. Online spaces, therefore, provide new possibilities for participation.²⁷

Devolution of research activities to local partners

According to a blog post published by IDS, the pandemic has 'forced the devolution of research activities to local partners.' The authors note that 'Covid-19 and the availability of participatory digital tools and methods represent an opportunity to transform the relationships through which knowledge is produced: away from 'Global North' researchers going to the 'Global South' and towards people from the 'Global South' leading the process.'²⁸ This also makes research more participatory. Another blog post discusses the fact that, in the past, even when local researchers have been involved in data collection, their involvement has largely been limited to logistics and sharing local knowledge. However, since the onset of the pandemic, local researchers have become responsible for leading data collection teams. One shortcoming identified, however, is that local partners still do not have access to datasets and are only ever given the final research report. The blog argues that in order to be able to use findings when implementing community-based interventions, local partners should have access to complete datasets.²⁹

²⁶ <https://www.ids.ac.uk/opinions/Covid-19-reflections-for-participatory-research/>

²⁷ <https://www.ids.ac.uk/opinions/Covid-19-reflections-for-participatory-research/>

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²⁹ <https://feedbacklabs.org/blog/Covid-19-an-opportunity-to-shift-power-in-research/>

Closing the digital divide

A blog post published by Feedback Labs, notes that, due to the pandemic, inception meetings and validation workshops have moved online, requiring local partners in the Global South to have internet access. The blog reports that, in Ghana, network optimisation has sped up due to the increased demand for internet access due to Covid-19.³⁰ Efforts to improve internet access, as a result of changing behavioural patterns due to the pandemic, have also been underway in other countries. In 2020, a network of giant internet-enabled balloons from Google's sister firm Loon was launched to provide internet access in remote areas in Kenya.³¹ The aforementioned blog argues that the internet 'is no longer a "nice to have" resource for international development practitioners' and that 'closing the digital divide for researchers in the Global South will offer new opportunities to shift power and decision-making to the Global South.'³²

Reduced carbon footprint

Researchers at IDS note that while there have been conversations around the high carbon footprint of international development work, it has been the pandemic that has put a stop to the 'fieldwork frenzy.'³³

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About this report

This report is based on 6 days of desk-based research. The Covid Collective research helpdesk provides rapid syntheses of a selection of recent relevant literature and international expert thinking in response to specific questions relating to international development. For any enquiries, contact Covid Collective- covidcollective@ids.ac.uk.

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