

How to Conduct Remote Research The Complete Guide



Too often, remote user research is considered "settle for it" research. It's research when the team lacks the budget to travel, the time to be in the field, or the resources to bring users into the lab.

And while it's not wrong to equate remote research with those advantages (it is often more cost-effective, or efficient, flexible, or scalable) it's wrong to think of it as a shortcut, or as a research back-up plan.

Believe it or not, when done right, remote research can actually get you better data—and more often than you'd expect, it should strategically be your first choice.

This guide details when it's most advantageous to leverage remote research, and how you can conduct it in a way that's as, if not more effective, than inperson methodologies. We'll cover the basic building blocks of a successful study, how to translate your research design for remote fielding, and some best practices to employ—across both unmoderated and moderated studies.



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What does remote user research look like?

With "remote" user research—or simply "remote research"—researcher and participant "interact" (e.g., communicate, exchange responses, conduct activities, hold sessions) via a (usually digital) channel or modality. Put plainly: there's something "between" a researcher and their participant, and some way to moderate exchange.

Historically, this was simply distance. Designers would leverage a cultural probe. They'd ship a package to a group of would-be or current users that contained items like a recorder, notebook, or even a map. Users would then complete a series of activities (outlined by included instructions) and ship the package back to the designers at a pre-set time and date.

If this sounds like a lot of work, that's only because it was. But the context and nuance of participant response, afforded to designers as they "observe at a distance," was valuable. It allowed them insights they needed to build something (e.g., a public park, an in-patient facility, advertising that didn't offend or clash with an environment) that would be harder to understand completely by observing participants in a lab.

Now the lion's share of remote research is conducted via platforms, apps, websites, and email.

And almost every kind of research methodology or approach can be taken remote—with the right tool or setup; from card sorts, usability tests, and shop-a-longs, all the way to deep-dive exploratory ethnography, most research can "fit" within a remote framework.

Remote research can be very powerful. For one, it allows you access to a wider breadth of people. International customers? No problem. People with mobility limitations? All good! With most remote research methods, you can access pretty much anyone with an internet connection. If you're looking to do usability testing, you might actually get more realistic contextual feedback.

> Amanda Stockwell President Stockwell Strategy

Shaping your remote research: the key questions

Certainly, remote works better for some methods than others (more on that below), but the primary variable to remember is the literal distance between you and your information—how will your approach shift when you're no longer in the room with your users? That's an imperative first step.

A secondary variable in considering remote research is the level of synchrony or moderation. Will the communication flow be moderated/synchronous (like a remote interview), or unmoderated/asynchronous (like a mobile diary study).

Moderated remote research is synchronous. You're "there" with the participant, walking them through a task or activity, and seeing as they see in real-time. This variant most closely replicates your traditional in-field methods, of course (in-homes, observational work, store intercepts), but requires careful scheduling by both you and the participant (just like it does in-person).

Unmoderated research puts time between you and the participant more clearly: you may be waiting minutes (or hours) for your data to "come in" to whichever platform or tool you're using. This is the approach many researchers need more time to adjust to, as it's the disruptive nature of the waiting time that can feel off (but can, as will be discussed below, produce eye-opening insights).

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Advantages of remote research (and when it's most appropriate)

The distance inherent in remote research offers many advantages, making it a valuable addition to any in-person or traditional research toolkit. A few distinct advantages:

Quality of data: The distance afforded by remote research can reduce many of the biases that afflict more traditional, in-person approaches. Social desirability biases ("How would a 'normal' person answer this question?", Hawthorne effects (i.e., changing one's behavior while in the presence of another, especially an observing "researcher"), and recall errors (misremembering or misinterpreting one's actions when there is time between the action and the reporting of it) are all front-and-center when a researcher is in a room with a participant. When there is space between a researcher and participant, many of these confounding or uncontrollable matters are lessened, producing more accurate and honest data.

Moreover, and for asynchronous unmoderated work in particular, participants often feel more comfortable sharing via mediated channels (e.g., their smartphone or an email). Mobile methods especially produce eye-opening, authentic, and exclusive access to the worlds of users; those intimate spaces or places, conversations that might include sensitive or troubling topics, and even the fleeting nature of some interactions are made easier to capture with a mobile remote methods approach. There's a wealth of research suggesting the comfort with computer-based disclosures felt by humans; leveraging this for human-centered design research needs usually more quickly gets to the heart of matters.

Remote research can also surface critical context that would be missed in traditional inlab settings. Maybe it's valuable to see your participant struggle with your app because of their lackluster on-the-go data plan. Maybe your interview being interrupted by a crying baby engenders empathy and unearths another layer of complexity to your currently outlined persona or user journey. Remote research can often give you a better handle of "how does this finding stand up" in the real world.

Broaden viewpoints: Access to digital technology is flatter than ever. By leveraging that access, remote research has the potential to bring a broader and more diverse set of users to the stakeholder table. Going beyond "your backyard" is easier than ever when the internet is your information exchange channel.

Furthermore, impactful remote research requires some control to be released to participants, which can surface novel and unexpected data. Consider the control exacted by a researcher during a lab or in-home: Questions are asked by the researcher as they see fit; similarly, diversions are mandated and followed only when the researcher deems them relevant or interesting.

With remote methods, even the most carefully-worded activity prompt might be interpreted in a different way by participants (e.g., what does "painful moment" mean?). This variance is a boon, however, because it has the chance to surface avenues of exploration a team couldn't have imagined before seeing it. Certainly, control is needed to answer specific research questions and support or deny hypotheses, but remote research's candor and unexpectedness can diversify the data streams (via diverse humans) used to make decisions.

Tool unification: In-person fieldwork can require a lot of gear and associated work that some remote research platforms streamline and centralize. Even the simple—but mighty—in-person interview contains a flood of tools—from notebooks and recording devices to the follow-up transcription services and video/photo processing needs.

With remote research, many of these services are improved and automated. Depending on your tool stack, your interviews might be automatically transcribed. Tagging, clip creation, and even note-taking functions might be built in.

All of this does require familiarization, but reduces the cognitive load required to conduct a successful project—moderated or unmoderated—by freeing up space to focus on the interview guide, activity prompt, or follow-up probes.

Budget: An outcome of tool unification is streamlined (read: lowered) expenses. Paying for 2-3 platforms sure beats paying for 15 to create the same quality of output (and eventual) insights. Furthermore, remote approaches eliminate or reduce travel/lodging and research facility costs, freeing up more for participant incentives or simply MORE research opportunities. For many, it allows you to still investigate key questions, when perhaps otherwise doing so would've been cost prohibitive.

Research operations: Recruitment, incentives, scheduling, informed consent, PII, legal approval, etc. are all within the purview of a successful and high-functioning research operations team. Many remote research platforms include these and other services, easing the amount of time needed to rely on and coordinate with research ops (if research ops teams are even present). Again, leveraging a remote research platform can open up and free space for more devoted time to the research itself, and not the—albeit important—attendant operations checklists and approvals.



Scale and speed: Budgets aren't the only aspects smoothed by reductions in travel, scheduling, recruitment, and tertiary research "to-dos"...Speed is also increased, and sometimes dramatically.

Compare the time to conduct a four-country observation study remotely to in-person; sometimes, the added richness of traditional just can't match the speed of remote (to say nothing of the likely increase in authenticity brought by remote). Remote gets teams moving faster and making more decisions, iterating, and then conducting more research

Remote research platforms have the effect of scaling insights-gathering internally, too. Designers, product managers, and even engineering teams can sit in on calls, manage remote participants, or help program activities. This not only grows empathy for the work of a UXR, it makes research a team sport, democratizing who gets to ask questions and reduces the distance—cognitively and physically—between researcher and stake-holder. Customer-centric organizations make it a habit to "talk to" their customers... period. Remote research makes this oft-cited business adage more of a reality than any in-person, traditional method could.





Disadvantages of remote research (and when in-person research might be preferred)

While just about any research question, method, or study design could be taken remote—there are a few exceptions and precautions we should consider.

- Avoid remote research **when a participant might endanger themselves or others** (e.g., driving, operating machinery, work requiring fuller attention).
- On the client side, work that requires **sharing sensitive**, **in-development**, **or beta deployments** can lack the control (and legal sign off) necessary to conduct research in a controlled way; unscrupulous participants can share stimulus material and introduce headaches into the product development cycle.
- Although remote research can be an asset for international research (how else to run a four-country study in a week from a single office?), it's imperative to have an **on-the-ground contact for cultural translation** in questions, activity prompts, and broader instructions; it's also helpful for responding in a timely manner to participants' inevitable questions.
- Many remote research platforms offer flexibility in design (and evolution as the project progresses), but it can feel restrictive to build something, press "play" on the activity, and then await responses. Impactful remote research does require more back-and-forth pilot tests to ensure clarity in questions and prompts—otherwise, the data that rolls in might not be the most helpful and stopping can be challenging for both participants and researchers alike.
- Similarly, remote research usually tackles a finite set of questions. Should a new theme or area of examination crop up, it might require creating a separate activity and re-recruiting new folks, instead of just stopping the current one and having the sample refocus. This sort of herk-and-jerk can make for unhappy (and unlikely to complete) participants.



- Moderated remote research (e.g., remote interviews or focus groups) can feel stiff, take extra time to "warm up" participants, and face technical problems (e.g., fidelity or bandwidth concerns on audio and video feeds). As with any "automated" solution, remote platforms' translation, transcription, invites, stim, observer settings, etc. can and do fail, causing frustration for all involved. If a desired sample or population isn't comfortable with technology, remote research won't likely be a good fit; similarly, those folks who are more inclined to participate in remote research panels might (speculative here) be different in some ways compared to the general population, restricting generalizability. As with any study, it's important to balance one's sample across all sorts of demo and psychographic variables to avoid drawing conclusions from a skewed subset.
- Because the outputs of remote research are largely digital in form (although printing is always an option), analysis can feel staid or clinical, lacking the enjoyment that comes with tactile engagement (think affinity mapping with a pile of responses or stick noting a journey map on a wall). Remote research's data (whether it's hours of video, pages of transcripts, or scrolls of moments) can feel overwhelming when a project is completed; compared to other approaches, remote research can require **more up-front analysis planned**, especially if leveraging a single platform. Many of these platforms have idiosyncrasies with naming, feature location and usage, which can slow down the process.
- Platforms and services are often in competition with one another, and data can be tricky—if not impossible—to export and import between providers. This is more the exception than the rule, however it's best to check out the capabilities of tools before launching studies with an on them and exploring how (if at all) data can be moved and removed, as well as who owns the data. Legal and IT teams may not sign off on some platforms simply because they're outside an organization, even if it will greatly aid in the completion of user research needs.

Make sure you test your remote study design. Test it with a colleague. And test it again with someone else who is in your target population. There is nothing worse than having to throw out data and speculate what people would have done or said if something wasn't broken or wacky with your study design.

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Translating your study design from "in-person" to "remote"

Some research types (e.g., usability lab studies) are more easily translated to remote than others. In general, here are some best practices to bear in mind and variables to consider:

Scope and participant fatigue: Because of your distance, it's easy to create too much work for participants. This will flex depending on the goals (e.g., the questions in a usability study could likely be replicated exactly in an unmoderated remote version), but it's a good practice to use moderation in question complexity and activity length, at least to start.

Without co-presence, noting confusion on a user's face or fatigue in answering won't be as easy (especially in unmoderated settings), so starting small(er) goes a long way.

Some methods, such as remote diary studies, work best when a focused, tight set of questions can be repeatedly answered over a fixed period of time. This aids in participant motivation, quality of responses, and moderation in-field.

Many platforms allow follow-up activities, such that if a new theme, trend, or question pops up during the initial fieldwork, it can be explored in a later study ("later" could mean the following day or week). Pacing and scope focus also works wonders with moderated remote work like interviews: Explaining the anticipated length of the session, question foci, and desired answer complexity (e.g., "I'd like for you to respond with a few sentences each) can level set and serve as a mutually-agreed-upon way forward. Participants will appreciate that you're respecting their time and feel more efficacious while responding.

Clarity is key: Anchoring, or creating a prime, trigger, or cue for a participant, is imperative when leveraging distal unmoderated methods. Because the researcher and participant aren't sharing a space, there needs to be a gap filled that alerts the participant to answer and/or respond. In this way, a trigger or anchor is foundational to any successful remote research study.

Ask, "When should a participant [insert action]?" and answer with a clear, terse, and focused instruction set. A participant will have many, many other things on their mind during your fieldwork, so creating something to which they can anchor (e.g., a moment, a kind of interaction, a feeling, a type of step) helps them remember to pop open the tool used to collect feedback (a smartphone app, a notebook, etc.) as close to the moment of interest as possible.

Remote methods really fight recall bias best when a trigger grounds a participant clearly. Brainstorming questions around that trigger also focuses the task and/activity to only ask what's necessary (see above about fatigue), creating a smoother flow from moment of interest to capturing feedback about it.

For example, a journey map should ground a user in that journey and ask for the steps usually taken to accomplish the goal. The questions for this trigger should focus on a singular step (e.g., what is the goal, how often does this happen, how important is it, what tools or services are being used, etc.) so as to capture only what's relevant. Again, remote research is typically easier to spin up, making deeper dives possible later.

Start with the end: This applies to any user research method, quant or qual, but especially for more qualitative remote methods. Data can grow quickly with remote research: think transcripts, videos, open-ended responses, and passive data points like time/date stamps. Even after just a week in the field, the data amount can feel overwhelming, leading to "analysis paralysis."

Before programming a single question, start with the problems and hypotheses driving the research and work to create prompts and activities whose responses will serve to answer them. In-person work allows for more flexibility and spontaneity; remote research requires more forethought and rigidity in approach.

Because of this, strive to outline the analysis needed and then work backward, asking and answering what is needed to make such an analysis happen. This flows from the fatigue and focus practices: If starting with the end, each question will have a clear purpose and fit into an analysis schema. This applies for more generative and exploratory research just as much as it does benchmarking be choosy with the questions and prompts and know why a participant is responding to them.

Know tool blind spots: There is a wealth of tools, platforms, and services (see below) available to support in remote research. As with any research provider, there will be shortcomings in access, functionality, and outputs; knowing these before pressing "launch" is key to preparing for the kinds (and amount) of data coming back. Pulse checks communities, listservs, and groups to solicit favs and (to the extent possible) get demos and capabilities run throughs before starting work.

Unlike in the field, where all senses can be fully leveraged for conclusions, remote places a barrier that can hinder insights. Knowing those barriers or blind spots beforehand saves time explaining them on the backend. Furthermore, creating activities and studies that leverage the benefits or strengths of a tool or platform is much easier when it's better understood.

Building your remote research toolkit

We won't go too deep here into naming names (we'll default to this UXR crowdsourced airtable on research tools for the specifics). Instead it might be more helpful to explain the different "classes" of remote tools available, and which of them might be suited to meet your specific research needs.

Full-service tools: These are best described as platforms offering suites of research activities and features to support in variety and kind related to research. These provide operations support like recruitment, moderation, and incentive processes in addition to a fuller suite of tools.

These platforms hew along two lines: usability and broader research (generally qualitative). The former typically requires a screen, prototype, or concept to "show" a group or single user and affords classic measuring metrics like time-to-task, survey questions, click trails, and heatmaps.

The latter covers everything from interviews to diary studies, and typically leverage apps or websites to collect data. If the questions faced vary and/or access to a research operations group isn't available, these are a solid choice; they're also helpful for getting started, as their broader feature suites can serve as onboarding for the universe of potentiality.

Research method-specific: Beneath the (or adjacent to) the all-in-ones are platforms specifically tuned to a kind of research method or approach. Interview platforms, benchmarking platforms, concept-sharing platforms, just about any method or tool has an associated app or software that can make it happen. This category's functionality and features will certainly be more robust given the narrow focus, so if a particular kind of work is important for questions, seek these out.



Analysis-specific: Just as there are methods-specific tools, there are analysis-specific tools and platforms, with many extending to repository and collaboration functionalities. Most of these require data to be brought or imported into them, whereas the aforementioned platforms often work to bring data in. From tagging, transcribing, collating, charting, plotting, and the like, these tools help attain a specific output or outcome deliverable. If stakeholders ask for a certain kind of analysis over and over, these might be the place to start, especially if data are already collected in-house or there's enough of it to begin work immediately.

Secondary tools: Most of the tools reviewed above, regardless of their focus, require subscriptions and or are not free. There are, however, lots of ways to hack software and tools made for non-research ends. Examples abound of UXRs leveraging G-Suite for everything from diary studies (via Gmail) to tagging and coding (via Sheets). Similarly, video conferencing tools (Hangouts, Zoom, Skype) are useful for remote interviews or even lab studies, with a few workarounds. If the budget is frozen or these tools are just more familiar, there are ways to hack and modify them for remote research aims.







Moderated remote research: step-by-step considerations

Moving from moderating in-person research to remote research can feel like a big shift, but by and large, a lot of the practices stay the same. What changes is the need for incorporating additional tools and a shift in mindset. Here are a few best practices to consider.

Study design: Shifting from in-person to remote moderated research requires a bit more upfront planning and preparation. It's important to be even more intentional in the study design and to clearly identify key areas where you will be relying on virtual tools. This is true for both the tools you'll be using to facilitate the interviews and the tools you may be using to facilitate collaboration with your team.

As you design your study and choose your tools, ask yourself:

- Will the research be entirely conversation-based?
- Will you need to share a screen or present stimuli?
- Will participants need to manipulate stimuli or simply respond?

Then, ensure you choose a tool (or workaround) that accounts for those needs. Set up a number of practice sessions to pressure-test your set up under a variety of circumstances from both a moderator and participant point of view to iron out any kinks.

Just like you would invite key project stakeholders to observe interviews or focus groups from behind the glass at a facility, get those same people "in the room" with you during each remote session...Having observers in the moment will help you glean critical insights in the moment that would have otherwise been lost in translation as well as pivot tactics and improve from session to session."

Matthew Doty Founder & Principal at XD Go!

Participant recruiting/management: In many cases you'll be asking for just a little bit more from your participants during remote research. Consider additional recruitment criteria such as connectivity checks and tech savviness on top of traditional articulation checks.

When scheduling interviews provide your participants with clear expectations around any programs, they may need access to and directions on how to make sure they're upto-date.

Some of the natural getting-to-know-you moments aren't always incorporated into remote sessions, so be sure to take a few minutes at the beginning of your session to make the participant feel comfortable before jumping in.

Data management/analysis/synthesis: Consider how the tools you've chosen for moderation can output data for analysis. If you're using multiple tools, it may take some time to aggregate all of your data by participant. If your team is also remote, consider looking for embedded analysis features in your moderation tools or look for online collaboration options. Tagging features, virtual whiteboards, and cloud-based storage can be ways to support collaboration.

Sharing out: Take advantage of the raw data you've captured; show videos and screen shares to bring your points to life. Many tools are designed to create outputs that can be shareable. You can build empathy by building in participant tasks for stakeholders to complete as well to create an immersive experience. Get creative!





Unmoderated remote research: step-by-step considerations

To best explain the value and logistics of remote unmoderated research, we'll walk you through an example case.

Say you wanted to observe in-person what people do right when they wake up, and right before heading to bed. You want to know what variables impact the routines of adults.

Pre-research: Map a list you want answered by the end of the project. This prep will help to guide your project design, help you recruit and field more efficiently, and will ensure a tight project focus—essential for remote qual research.

Recruit: When recruiting for remote research, and aren't tapping into an existing user pool, it's important to create a list of must-have qualities you're looking for, and to create screener questions that capture this information. Remote recruiting often means people can more easily apply for opportunities so you'll want to identify what criteria will disqualify participants and include these questions at the beginning of the screener. This will save you time when sorting applications by only showing you people who meet your needs and are respectful of people's time who might not be a good fit.

When crafting screener questions, you'll want to include a variety of question types, but lean into closed-end questions that are easier to filter by. Including variety in the screener allows you to see how participants will respond to a range of questions in the digital field, and close-ended questions will make it quicker to find your good fits thanks to the power of filtering.

When selecting participants, you'll want to factor in 10% to 15% drop-off rate, and over recruit accordingly. Remote recruiting tends to move quicker because participants can easily apply, if your recruit isn't super niche.

In the "morning and evening routines" case, say you want to talk to individuals who come from a variety of socioeconomic backgrounds and household compositions—but have a specific set of habits and product usage you're were interested in observing (ie. taking their phones to bed, utilizing a voice assistant in the morning, etc.).

From there, you might put together a screener with 25 questions total, of which 3 questions are "knock out questions" (or contain terminate logic). You'd opt for a screener that is on the longer side because the recruiting needs are more dynamic (normally at dscout, we'd keep screeners to ~15 questions long, and include 2-3 knockout questions per screener).

You might also look to over-recruit in case of dropouts. So, if in this case, you're looking for 25 full completes for your study, invite 30 participants to cover your bases.



Data collection/"fielding": The most important task for digital qualitative research is the art of collecting data in a way that's as human as any in-person research would be. You'll want to be thoughtful about what question types you're choosing, and what you plan on doing with the collected data plays a big role in dictating the kind of questions you'll ask.

Generally, it's best to choose close-end prompts for more straightforward questions which will help you filter and sort information when doing analysis (more on that later!). Media prompts will be your bread and butter for situations where you want to observe something or get to the "why" of something. You can use open-end prompts to collect responses to questions that require more thought but aren't crucial to see so vividly.

It's important to be as specific as possible with your questions to make sure your participants understand what you're looking for. If you're using video prompts to understand behaviors, for example, you'll want to establish a clear trigger for participants to know when they should be recording a video.

Another perk of remote research is the easy ability to communicate with participants to probe deeper into their responses. Keep a pulse on incoming information on a regular basis so you can follow-up where needed and get prepared for the data deep dive ahead.

Following the example above, you might design a research study with 3 parts to capture morning and evening routines. In the first part, you can ask for a general introduction, including a video prompt, in which participants walk you through what they typically do when they first get up and right before heading to bed.

You can then ask participants to talk about the products they use in these routines. If you want to see this over time, ask participants to check-in for 7 morning routines and 7 nighttime routines over a two-week period. Ask your scouts to record the routines as they happen.

After the two-week period is over, you might have a few follow up questions in mind. Send your participants another video prompt where they discuss what would improve their morning and evening routines in an ideal world. **Analysis:** Ample data can be a blessing and a curse, and the analysis tools at your disposal coupled with your intentional question types will be your saving grace. We recommend our deeper dive read on analysis, which provides analysis tactics whether you have two weeks or an afternoon.

In the example so far, you might take a day-by-day approach to analysis. Take a moment to sit with your data, diving into the morning and evening routine videos to identify key moments and creating prototypes to speak to the observed experiences.

Then maybe tag your data and use filters to find people with different age range(s) and difficulty of routine(s), before exporting data based on those segments. All the while and be well-served by sharing videos of routines internally with product designers, then brainstorming products that relate to the experiences of the participants. At the end of the project you'd hope to have a handful of designs to bring to life based on feedback and stories, which you can again, conduct research to solicit feedback on.







Conclusion

Whether it's budgetary, a blind spot in data, friction in cross-team collaboration or shareouts, or even a need for voice-of-the-customer/qualitative research, remote can be a solution. The abundance of platforms, services, and tools combined with the wealth of writing and guidance offered by communities and organizations (e.g., EPIC, UXPA, UXR Collective) make it easier than ever to get started with remote user research.

As People Nerds, we dissect *how* to answer the big *whys*

Read our interviews with top UXR practitioners and pick up a few pieces of novel advice for every stage of your research project cycle.

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