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### Online Communication Settings and the Qualitative Research Process: Acclimating Students and Novice Researchers

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## **Abstract**

In the last 20 years, qualitative research scholars have begun to interrogate methodological and analytic issues concerning online research settings as both data sources and instruments for digital methods. This article examines the adaptation of parts of a qualitative research curriculum for understanding online communication settings. I propose methodological best practices for researchers and educators that I developed while teaching research methods to undergraduate and graduate students across disciplinary departments and discuss obstacles faced during my own research while gathering data from online sources. This article confronts issues concerning the disembodied aspects of applying what in practice should be rooted in a humanistic inquiry. Furthermore, as some approaches to online qualitative research as a digital method grow increasingly problematic with the development of new data mining technologies, I will also briefly touch upon borderline ethical practices involving data-scraping-based qualitative research.

## **Keywords**

online qualitative research; teaching qualitative research methods; social media; online research settings; qualitative data analysis

## **Introduction**

Nowadays it is highly cumbersome to conduct a fully functioning social and professional life without the use of communication technologies delivered through either hand-held devices or computers. This is in part because of recent advancements in communication technology and network infrastructure that have resulted in easy-to-use and highly accessible consumer products. The development of Web 2.0 (Augustsson, 2010; boyd & Ellison, 2008) has facilitated greater human interaction through social media platforms in the form of interactive text, voice, image, spatial reconstruction, and video (Caliandro, 2017; Murthy, 2012; Safronova, 2017). The delivery of Internet access

through the availability of new applications makes a critical analysis of the specific tools challenging for some scholars (Wilson & Peterson, 2002). This said, the baseline definition of this technological “space” situates “online,” “mediated,” and “digital” as synonymous with the development of each new platform (Caliandro, 2017; Murthy, 2008). It is therefore not surprising that human interaction mediated through these platforms has become a locus where qualitative research and digital methods need to be adapted (Morrison, 2016; Reich, 2015; Underberg, 2006). Not only has access to evolving technologies broadened the scope of the field for social science research, but it has also provided availability to large amounts of data that have drastically changed the methods and tools employed to extract relevant information, and to some extent, what is considered qualitative methodology. Consequently, with the commercialization of these new technologies have come new ethical and humanistic issues for scholars and educators to address in their research and in the classroom (Reich, 2015). This article contributes to a growing body of writing that focuses on the pedagogical and methodological challenges that I faced when providing instruction on qualitative research, with an emphasis on online data sources and digital methods, to an audience of novice researchers and students.

In the past 20 years, qualitative research scholars have begun such an interrogation of methodological and analytic issues concerning online settings and machine systems (Arnold & Paulus, 2010; Coleman, 2010; Lunnay, Borlagdan, McNaughton, & Ward, 2015; Saunders, Kitzinger, & Kitzinger, 2015; Underberg, 2006; Wilson & Peterson, 2002). Garcia, Standlee, Bechkoff, and Cui (2009) provide an overview of existing Internet and computer-mediated ethnographic research demonstrating how methodologies are in the constant process of adaptation to new platforms by “offline” ethnographers. Best practices for developing research methodologies for the Internet, mobile applications, other participatory outlets, and the platforms on which they are delivered can be particularly challenging in a classroom setting where students must be entrusted as novice researchers. While there is some research on the effectiveness of participatory tools in hybrid learning environments (Halic, Lee, Paulus, & Spence, 2010), based on my observations, tensions can mount as some students, in their dual role as student and consumer, approach online social interaction as a naturalized behavior and therefore normalize their technology consumption as a form of entertainment. Thus, it should come as no surprise that some students in my courses have expressed resistance to engage with any social media outlet as a potential site for observational and ethnographic research. Hence, there lies the challenge of this article to identify adaptive methods for pivoting students’ relationships to communication technologies toward a more critical

approach, whereby the platforms can then be examined as socially constructed and shaped by forces in the physical world.

Pedagogical instruction can acclimatize students and novice researchers to changing technological and interactional conditions in the field exposing the types of tensions that manifest when students engage in online platforms as a source for research. The forthcoming steps and themes covered are based on my observations as an instructor of key points of tension that have emerged in my teaching to diverse student audiences and in my personal research, and less of a playbook (Gregory, 2005a). In fact, there is no telling how these methodological tensions would play out in other classrooms. Here, I identify and analyze some of the protocols implemented, but by no means do I identify all of the methodological techniques adapted for different stages of the research process. In the first part of this article, I examine a few of the in-class steps taken, including class exercises that guide students to utilize a more critical lens when analyzing their own engagement with online platforms. In the second part of this article, I briefly discuss the encroachment of quantitative data protocols and how they are capitalized, affecting expectations and best practices in online qualitative research methods. Specifically, I discuss what I find to be problematic in data collection of online sources, which includes the blurring of methodologies, in my own research settings and that of student research projects. Finally, I briefly touch upon ethical practices involved in data-scraping-based research that affects the state of the methodology.

As a transdisciplinary educator, I have integrated qualitative and quantitative research methods in traditional social science courses and have adapted methodologies into coursework focused on sociology, cyberspace communication, conflict resolution, health care administration, and criminal justice focused programs. In my former role as the qualitative data analysis and survey design specialist at a university, my use of technology was not limited to teaching and data collection, but also to instructing faculty, staff, and students on how to use qualitative data analysis tools and to providing them with methodological support. This role was not unlike my position at a public health department where for 5 years, I was the media evaluation researcher, again, designing, coordinating exploratory research, and providing methodological support to inter-bureau research projects. In each of these positions, I have been confronted with the limitations of applying traditional qualitative research methods to online settings and with the ethical

implications of conducting human subjects research with faculty, graduate students, and researchers who are eager to deploy these tools for online research projects.

### **Why This Is Meaningful**

The tenets of research methodologies, as they are deployed for the intention of social inquiry, can be integrated into any curriculum across academic fields (Starks & Trinidad, 2007). Ethnography, in particular, has come to take on slightly dissimilar definitions across disciplines (Shaw, 2016; Starks & Trinidad, 2007; Wilson & Peterson, 2002). There is, however, something experiential, if not universal, about the storytelling in all good ethnographies that should not preclude an ethnographer from entering an online space that is immersive (Caliandro, 2017; Mitchell & Charmaz, 1998; Muller & Gubrium, 2016). Under ideal circumstances when writing about and participating in digital environments, the user experience “transports” the participant to a simulated space that connotes a form of sensory “immersion.” It is precisely this transportation—which can include virtual environments, online community forums, even asynchronous social media sites—that makes the process and the encounters it entails so promising for good storytelling (Danet, 2001; Underberg, 2006).

A tool kit of qualitative methods cannot simply be trans- posed onto an online setting. For instance, the conceptualization of “fieldwork” is suddenly thrown into turmoil because of the lack of physicality (Freidenberg, 2011). In its place, there could be text- and image-based communication or the scaffolding of a portal or landing page. The way that actors interact and perform identity can also be destabilizing, if not downright misrepresentative or fragmented (Robinson & Schulz, 2009). Power dynamics may still be reproduced both by institutions and individuals, or there could be a disruption with the social order (Nakamura, 2007). Given the multiple ways in which human interaction can occur, best practices using these methods can never be static and therefore require examination as they are applied to a mediated environment. Thus, methodological “adaptation” must continuously evolve with the advent of new technologies (Robinson & Schulz, 2009).

For some undergraduate students, indoctrination to standard qualitative research methods begins with expo- sure to data literacy, long before the student enrolls in a research methods course. But for many undergraduate students, their first exposure begins with the application of methodological principles, which usually includes a weekly introduction

to cookbook steps for the purpose of conducting participant observations or in-depth interviews. Often times, quick immersion into these practices may be insufficient when sending a novice out into a physical field or into a face-to-face interview. And while the qualitative methodological crisis of what constitutes data may not be answered fully here (Pink & Morgan, 2013; Pink, Sumartojo, Lupton, & La Bond, 2017; St. Pierre, 2013), to designate the research setting as “virtual” or “online,” or to hold interviews through mediated text, audio, images or video, students require incremental and ongoing awareness of data and media literacy, both qualitative and quantitative, to accomplish learning outcomes of such a project.

There are undeniable constraints to overcome when conducting this type of research (Pink, 2013; Pink et al., 2017; Reich, 2015). In particular, this involves confronting the disembodied aspects of applying what in practice should be rooted in a humanistic inquiry. There is no way to avoid how the mechanics of a technological platform can elicit some forms of engagement, negate other types of interaction, and not have some influence on the qualitative research process (Byrne, 2017). Online communication platforms that predate current social media outlets that were well established as locales for communities to organize around shared social, cultural, political, or health-related interests had similar constraints (Denzin, 1999; Gregory, 2005a; Gregory & Wood, 2009; Turkle, 1995). Even as early as 2001, when my students in a qualitative research methods course expressed interest in observing online settings or deploying a digital method for interviewing participants, there were adjustments to be made. In the first case, students observed message boards where teenage girls who identified as ProAna shared their health-threatening techniques for outmaneuvering enforcement of daily dietary intakes, and in the second case, students utilized email and instant messaging as convenient tools to conduct in-depth interviews with recovering substance abusers or remote online activists who were physically inaccessible to the student researcher. Each project in its own way struggled with text as a representation of human embodiment and interaction.

Given the abstraction of some online engagement, the educator must stress why the student must never lose sight of how their data collection process functions as a form of human engagement (Coleman, 2010). In hindsight, I may have been too ambitious immersing some students in online ethnographic settings with the assumption that they could take this cognitive and emotional leap. In most cases, though, student projects have turned out well and to my knowledge there has been minimal harm done to the observed or the student researcher, but there has always been

the risk of harm with any observation or interview conducted outside of class time, beyond the watchful guidance of a faculty member. Needless to say, a junior researcher should have been immersed in the ethical possibilities of the medium, observational access, sample screening and recruitment process, line of inquiry, and any other potential risks that could do harm, no matter how abstract or mediated participation becomes throughout the data collection process by the time they enter the field (Saunders et al., 2015).

## **Buy-In**

The first obstacle teaching qualitative methods in an Internet setting involves “buy-in” from undergraduate students. Resistance to buy-in can occur largely because students typically express some degree of disbelief in the possible development of a critical or textual analysis of social relations from an online inquiry. Although most of the students I have worked with over the years have been nontraditional or first-generation college bound, the majority grew up with Internet access as video gamers or first adopters acquiring mobile hand-held devices at a relatively young age. Furthermore, the participatory nature of social media networks lend to cultivating users who are both consumers and producers of digital content (Coleman, 2010). These digital nativists often perceive the medium as a source of entertainment or as part of daily routine (Pink et al., 2017). Even with immersive exercises suggesting ways a new platform can be examined through social interaction and power relations on the Internet, some students struggle to approach the field setting critically. Thus, framing virtuality or any digital communication platform as a source for intellectual inquiry through the lens of a constructivist approach takes time and effort.

## **Preparing Students to Ways of Seeing**

How does any social scientist teach students how to examine their social world as a social construction? Not unlike the introduction of Peter Berger’s (1972) *Ways of Seeing* examining representations of gender and social class in art and advertisements, the first critical steps students take involve examining the construction of identity through textual and visual representations that have become part of the routinization of daily social media use (Pink et al., 2017). Through an examination of these social media outlets, students as both researcher and consumer can identify how users “perform, construct, and disseminate facets of their identity” (Lalonde, Castro, & Pariser, 2016, p. 40); through the

study of this context, students can explore how fluid the expression of identity can be (Lalonde et al., 2016; Nakamura, 2007; Turkle, 1995). Whether these visualizations are in the form of graphics, naming handles, acronyms, photographs, hashtags, or videos, they become stand-in metaphors for a state of mind, mood, feeling, sense of self, or collective identity (Nakamura, 2007). This is similar to the insertion of an emoji or animated gif in a Facebook response to express an emotion or reaction to a post (Radnofsky, 1996). The naming conventions users choose when entering a social media space can inform other users of their multiple identities, political stance, and occupational roles in society. For example, students clue into how users communicate their participation as volunteers or identify as cancer survivors as an announcement of their values and experience. Each of these experiences requires a universal symbol or textual hashtag for decoders to interpret in a shared and meaningful way. Interrogation, therefore, of these visualizations around the constructs of race, gender, sexuality, ableism, ageism, and social class serve as proxies for the self and can contribute to a meaningful starting point for analysis (Nakamura, 2007).

In some cases, the user may want to be less encumbered and does so by blurring a facet of their social demographics unknown to other users. One very useful exercise involves junior researchers taking on the identity of the “other” by appropriating an avatar. Early research (Kolko, 1999; Turkle, 2005) suggests young people do not distinguish between online representation and the physical self. This suggests that through virtual experimentation, young people can explore the boundaries of their own sense of self by deploying avatars. Users’ construction of avatars—through gender, race, and across species designations—are somewhat out of their control because of what the developers of these products deem as an option (Morrison, 2016).

One early exercise that I introduced in class began as a game without consideration of how identity can be appropriated and deconstructed using textual, graphical, or elemental layers. Students would soon learn how easily they could lose control of how participants perceived them based on their selection of a naming convention, trans-species-identification, skin tone, hair texture, clothing, morphology, and gender (Gregory, 2007b). Students would later discuss whether appropriating a potentially gendered, racialized, or a socially stereotypical avatar online was more about misrepresentation than how one negotiates identities and values reproduced from the physical world. Use of an avatar can chip away at the notion of a core, essentialistic self if the faculty member plants critical questions beforehand. Students can playfully explore how “real” world social demographic markers are translated,



deconstructed, and reconstituted in an online space. And while this exercise requires some degree of management on the part of the instructor, it has the potential to guide students to recognize the limitations of an essentialistic approach to reality that is imposed on each of us, regardless of station (Gregory, 2007b).

When Facebook first emerged in 2004, its initial target audience was specifically college students, but it eventually expanded membership to high school students and then to the general public (Kirkpatrick, 2011; Lee, 2012). Students need look no further than their engagement with social media to identify how they participate as members of multiple cultures and to examine how social worlds are constructed through mediated text and imagery (boyd, 2015; Lee, 2012). As some of the earliest adopters of these new communication technologies, teenagers have developed their own shorthand language using acronyms and appropriating new slang to outwit observing adults (boyd, 2015; Subrahmanyam, Greenfield, & Tynes, 2004). This may be common knowledge for researchers of youth culture, but it serves as a way to suggest to students how culture forms through the production of language and functions as cultural reinforcement for those populations (Pool, 2017; Starks & Trinidad, 2007). It also speaks to how teenagers devise cultural innovations to create coherency through digitally mediated communication. As a class exercise, students turned to their own cell phones to capture either a text thread or a series of social media comments to mine for slang as a signifier of shared meaning. Spillage between mediated and face-to-face communication could equally lead to ways the rules of communication are broken when transferred to “real life” engagement. Thus, student observation of their use of slang with Facebook friends or Instagram followers can shift the focus on shared meaning and language construction.

As a self-reflective exercise during which students examine how “self-selective” they are when constructing and facilitating an online identity (Lee, 2012), I instruct students to collect data on themselves and then have them pair up with another classmate to interpret how each student presents “the self” to their social media audiences. This exercise can inform participants as much about the construction of the self as it does about aspects of their lives that are not on public display. This exercise also makes for an effortless pivot to the proliferation and normalization of online dating sites. Similar to the Facebook profile, and the recent repurposing of Instagram accounts for dating hookups, the deconstruction of dating site profiles can tell observers a lot about romantic aspirations and the presentation of an aspirational self (Safronova, 2017). When students juxtapose their own Facebook page with traditional dating sites

profiles, they begin to examine how our reconstructed selves can be inflated in this context. This includes what dating profiles tell us about gender roles and sexual identities, and our expectations of romantic love and sex. The interlocking topics of sexual desire, the aspirational self, and social bonds begin to broach a discourse about the power to construct to self, veering ever closer to the question of misrepresentation.

A crisis in misrepresentation, whether in the actions of the participant or the researcher, becomes an unavoidable ethical issue to stress before every exercise or assignment (St. Pierre, 2008; Whiteman, 2017). When entering an online research setting, students and researchers, alike, can effortlessly exploit the role of anonymity or self-misrepresentation for the sake of gaining unwarranted access to online communities, especially those built and sustained by vulnerable populations. Transparency and disclosure, which I strongly encourage, can become a central issue in online research, as even my best instructional efforts could lead to mis- use of the medium. This occurred after I provided explicit direction to my students, when one of my students misrepresented themselves on a Mothers Against Drunk Driving (MADD) social media site. The student's actions made it apparent to me that the reckless thrill of gaining access to a community could come at the expense of being authentic about one's interest in a topic. In this case, the student arrived to class late sitting at a computer station in the back of the room, and in the time it took for me to make the rounds to his computer station, he had already amused himself with a convoluted story about being a parent of a deceased child for the purpose of gaining access to a group. Yes, I was horrified and told the student this was unacceptable behavior. I may have told him he might have to drop the course if he continued to breach what students had agreed upon at the start of the semester. In hindsight, maybe a signed contract stating a student will conduct him or herself at all times with integrity and honesty would have stressed the seriousness of the point. The incident speaks to how the veil of anonymity can conceal issues around integrity and the ease at which dishonesty can occur. Maybe now more than ever given the bullying and anonymous hate speech used in forums, an ethical approach to Internet use must be added to any media or information literacy curriculum.

### **Research Design Consideration: Disclosure in the Field**

Many years have passed since Norman Denzin (1999) first addressed what constitutes a public space and whether consent must be obtained before observing an online community (Denzin, 1999). It has been almost 15 years since I

received informal feedback from Internet scholars who concurred that “lurking” online did not constitute as an ethical issue, thereby reinforcing my treatment of the chat room in question as a public space after the institutional review board (IRB) at my home institution gave me approval to observe anonymously. In this respect, the issue of researcher transparency has been strongly linked to how academics define public space and their perceptions of right to privacy as it relates to technology use (Kruse & Norris, 2018). Today privacy settings on Facebook, Twitter, Instagram, and LinkedIn determine the extent of public access; however, at my current home institution, the IRB requires researchers to acquire consent from Twitter and other social media authors in the event a tweet or posting is quoted (Kruse & Norris, 2018). The program chat room study mentioned above received IRB approval for conducting an observation without identifying me as the researcher in the space (Gregory, 2007a). Changing the name of the site and the key participants’ usernames seemed like adequate steps to conceal member identities as well as mine; however, this may not have been the case (Bickford & Nisker, 2015). The volatile subject matter left me feeling ambivalent about self-disclosure for a number of reasons. First, I felt I was potentially in harm’s way by disclosing my identity on the forum, particularly at risk of retaliatory action from fringe members frequenting the space through cyber-stalking, use of malware, or locating me through access to my IP address. Second, given that everyone in that space was afforded the same degree of anonymity, I concluded this was a right that I shared with everyone else in the chat room. Of course, this *assumption* raises who has power in the environment, and how human agency does not disseminate equally if a researcher chooses to withhold the intentions of their authorial gaze. To this day, I wonder if the pseudonyms designated to conceal the chat room site, its members, and my own presence in the space were nothing more than a weak veil of protection. Even pseudonyms—whether used to conceal “a particular identity of a site or community”—are sometimes not enough to protect the identities of users of an online site (Bickford & Nisker, 2015).

In the case where self-disclosure becomes a mandatory criterion for an online research project, the protocol cannot always be enforced as students rush to start a project. Advocating the benefits of transparency in an online research setting can be the only option that leads students to develop authentic loose social bonds forged over a common cause, condition, or interest. Thus, recognition of cultivating trust and a trustworthy public persona are value-based and are analogous to building brand confidence. Consequently, the process of self-disclosure online, in some cases, has led to more honest relations, deeper understanding of specific social settings, cultivating reciprocity, and fostering human

subjects with the option to interact with the observer as a researcher or not (Lunnay et al., 2015).

With all these precautions taken, the ethical intent of online transparency may not come to fruition with highly efficient data-scraping tools that gather backend data.

These functions may not necessarily benefit the researcher, its findings, or the human subjects unsuspectingly included in the research. Nevertheless, easy access and the desire to collect large data sets, often drive researchers to treat backend data as “text” rather than as human communication, geospatial locators, or data that can link to other possible identifiers (Lunnay et al., 2015). Thus, the roll out of these new social media platforms and more invasive data-scraping functions at the backend of all computed outputs put researchers, institutional review boards, and technology developers at a crossroad requiring a thorough debate about anonymity, online space, and right to privacy.

### **Research Design Consideration: Membership Versus Non-Membership**

Qualitative methodologists have long debated the question of who has the right to conduct research on a target population or setting based on the socio-demographics and historical situatedness of the researcher (Pillow, 2003; Tietze, 2012). This positionality of the researcher cannot be separated from his or her engagement with and interpretation of a research population or setting. That said, when fieldwork takes place in an online or physical space, a researcher’s identity claims or membership does not necessarily guarantee entrée into a community; in some instances, the role of outsider benefits the researcher or research process; other times entrée in the field requires membership (Saunders et al., 2015). As in the case when I conducted observational research in a progun chat room (Gregory, 2007a) and then later in online sites designated for conspiracy theorists touted as 9/11 Truthers (Gregory & Wood, 2009), there were fewer, if any, gatekeepers filtering access to the community or interrogating my presence as a researcher. In some public spaces, or those that are perceived as such, there is no accountability from gatekeepers or members should an outsider join in to observe without engaging the group. For this reason, rigorous identity and access questions need to be addressed when conducting online research, treating entry in the field as a process that cannot be distilled down to a formula (Gregory, 2007b).

On most occasions, I find it exciting when a student discovers a new topic that sparks enough intellectual curiosity to embark on a qualitative research project. I would not dismiss entering new uncharted territories if a student had the integrity to enter the field with a nonjudgmental openness; however, not all students can negotiate new online spaces as an outsider (Gregory, 2006). If a student expressed intimidation when entering an online space in which he or she was an outsider, I would encourage the student researcher to seek a setting where he or she had a relationship to the topic of observation (Saunders et al., 2015).

What steps need to be taken for entry into online cultural spaces when the student is a nonmember or when the communication in the online community involves hate speech depends on a case-by-case basis. Entering such an environment can be emotionally harmful to the researcher, thereby putting them at risk. Such a scenario became particularly challenging when two students decided to observe a white supremacist group. While one male student identified as white and the other student identified as Black and female, both students could not have approached the site from the same position given how the social organization of the group's mission is based on a negation of the Black student's personhood and the racial supremacy of the white student. In the case of the former student's paper, the themes that emerged from the fieldnotes centered on understanding codes of kinship and how racist ideologies and rhetoric were reinforced through repetitive social interaction. Neither student belonged to the group, but their own positionality as researchers shaped the way they observed and took fieldnotes, hence determining how those fieldnotes were interpreted through coding and analysis. While the white male student may not have felt directly threatened or perceived the existential weight of the space, the African American female student felt a moral obligation to observe and expose the intentions of the group.

Research conducted on online hate groups may put observers at obvious risk, but online support groups should not be presumed as safe fieldwork sites. Social support groups have been fairly well established online (Malik & Coulson, 2008, 2010), but they need to be carefully vetted for potential harm to members and researchers alike before moving forward as a research project (Pillow, 2003). Two students in my research methods course choose deeply personal topics to explore online, but their rapport in the field led to different experiences. Both students presumed full membership in their respective community would justify entry into a support group setting. One student, who was dealing with personal fertility complications, sought out an online support group for women struggling to conceive.

Only women experiencing fertility issues were eligible to become members of the web-based support group. Anyone who had experienced a successful birth was not allowed to join. To gain full entry into the support group, the student disclosed to the moderator her medical complications and the technicalities she had endured in the past year. The other student built a message board for providing support to military families; however, she soon learned that married participants who joined the site would mostly reject her presence because of her unmarried status and her openness about the challenges of having a boyfriend redeployed to Afghanistan for a second or third tour of duty. Both students were authentic participants and members of their respective groups, but the student who created a military families support site faced consternation because her unmarried status did not afford her full membership. The student was told that she did not have “what it takes” to stick it out as a military wife. This backlash from the military family support community came as a surprise to all of us; it also reminded us that a self-declarative stance could be interpreted as adversarial or even a breach of the group’s code of membership rather than a sense of shared experience.

I take no objection to a student who is trying to quit smoking to then participate in a smoking cessation site, or a student coping with an eating disorder observing a bulimia support group, as long as they can observe those spaces without judgment of the values and beliefs shared on the sites. While membership in a group might not necessarily be required as a criterion for studying an online community, reflexivity is in most cases necessary to better understand one’s position as a researcher. Engaging a community from a state of humility to gain understanding of a particular population is both a performative and hermeneutic approach to the human condition (Di Iorio, 2015; Gill, 2017; Peck & Mummery, 2018). The power to observe can feel like a form of surveillance and too easily lead to a judgmental stance toward a population that faces stigmatization or does not hold the same values of the researcher.

Another noteworthy case occurred while I was teaching a cyberspace communication course in a Communication Department. Two students decided independently to observe a forum on the topic of obsessive compulsive disorder (OCD). One student identified himself/herself as having the condition. By sharing his or her own struggle with other members of the online support group, in addition to gaining permission to be a participant observer, the first student participated in the forum as a supportive peer to the other members; meanwhile, the second student, who self-identified as a conservative Christian, entered a similar space with a preconception about OCD. The latter student took it upon himself/herself, despite having agreed to protocols that would only include observation of the site without any

participation, to engage the forum members. The student ended up alienating some of the members when she expressed her opinions refuting conventional medicalization of the condition and subsequently offering Christian-based counseling. The group repudiated her recommendations and treated her presence as an interloper within the group.

While the case of the first student represented a nondisruptive approach to entering the field based on his or her engagement and membership, the case of the second student, despite her genuine desire to intervene, used the forum for a self-serving, disruptive, and potentially harmful project. To avoid a breach of protocols as the one described above, and to protect human subjects, I recommend educators instructing inexperienced students to request daily and weekly formal updates on the status of a project to prevent any deviation from the agreed upon research design, and to stress repeatedly that members of online communities should be given the same respect and care they would give support groups in the physical world.

### **Methods of Observation: How to Smell an Online Setting?**

The act of writing or jotting down observations with fieldnotes requires sensory observation, or lack thereof, in an online space. For many qualitative researchers, our senses can be central to how we observe a setting. If it is possible to smell danger or sense fear from an informant, where does emotional mirroring and interactional feelings surface in a mediated space? Burned in my memory is the smell of sweaty sexual relations and used condoms that took place just beyond my sight in a window of the Red Light District in the Netherlands, where I spent time in the field interviewing transgendered sex workers (Gregory, 2005b); an equally visceral experience can be said of my feelings of internalized fear when two key members of a progun chat room recited from Randy Weaver's biography using an audio software function (Gregory, 2007a). At the time, it seemed to me like a call to arms or a militia recruitment tactic. Both associations trigger memory as I reconstructed an interaction with a sex worker and her client or wrote about the fringe pro-gun movement in the United States.

The interview transcription process for qualitative researchers requires that we develop subtle extra coding symbols to identify shifts in speech, utterances, silences, and emotions encountered in face-to-face communication that cannot be captured through word-for-word translations (Bird, 2005). Communicating these techniques to students can be

challenging. What, then, do the pauses represent in an asynchronous email interview or through a Facebook comment thread? Some of these “pauses” can be interpreted as conversational pivots or a type of “ghosting,” in which the participant withdraws from the discussion and then ceases to have a digital footprint in that forum. Such a “ghosting” occurred after I had multiple email interviews with a director of a 9/11 conspiracy video (Gregory & Wood, 2009). As a result, I have never used that “transcript” for any subsequent article about the topic. This begs the question of how one might observe a social media site or chat room where communication is largely textual, asynchronous, or could include visual representations in the form of a JPEG, animated GIF, emoji, or video. Without longitudinal observation, the researcher may lack understanding of the context. To this end, these visualizations are posted in a social context intended for reception and interpretation that may not be universally understood.

The first crucial step in entering a virtual field is to familiarize oneself with the technological capabilities of the site under consideration, as different sites provide different tools for participatory communication. Once this is established, and the limitations on the topic of discussion that have been setup and agreed upon by the members of the community and its moderators have been understood, it is useful to consider the following points before gathering data:

1. What established cultural practices and etiquette are setup for new members to join the conversation or select a conversation partner?
2. What visual cues are communicated in the user- names of social media members to signify membership?
3. Beyond the use of emoticons, what “visual strategies” do producers use in their online communication?
4. What are some of the cultural innovations devised by members who frequent social media sites to create coherency in the conversation?

Given the continuous stream of information appearing synchronously and asynchronously, establishing patterns and threads of related conversations are relevant to any project. In this respect, it is very useful for students to breakdown conversation threads into monologs, dialogues, and multilogues and to identify the number of conversational threads taking place simultaneously. Such practices can be highly effective for a productive entry into the field.



## **Data Gathering and Coding Threads**

There is much to consider when teaching in the classroom during the gathering data and coding phase of student research. Gathering data and then coding a data set pose two challenges when conducting qualitative research of an online setting. Each social media platform—whether it is a message board, Twitter thread, Facebook page with comments, YouTube videos with commentary, or instant messaging platforms—requires data collection in a readable format that will be uploaded and then coded with a data analysis software tool. Long before NVivo developed a data-scraping technology called NCapture, that involves uploading an extension to the user's browser, or open source statistical software like "R" became a word search tool for social media scraping, qualitative methodologists who collected data from social media sites were resigned to more ad hoc, labor intensive techniques of copying and pasting textual and visual communication or screen capturing threads into .docx or Excel files.

Once uploaded into qualitative data analysis software (QDAS), coding line by line in search of themes could be problematic, as html source code clutter requires cleaning the data set. When using R, a term search could collate terms out of context. In effect, single terms and even chunks of data would then be decontextualized. Furthermore, sites with character limitations, like Twitter, have the added complication of requiring some reconfiguration of communication on the part of the producer. This means users must invent new ways to signify meaning on the fly with abbreviated and phonetic spellings. Unless the social analytic tool or coding scheme is calibrated to capture these nuanced and changing forms of language, much can be missed without the naked eye's surveillance.

As a result of these considerations, making meaning out some threads can be a struggle. Some social media threads drift in terms of topic focus. Other times, interlopers disrupt them (Gregory, 2007). As communication is often nonlinear or access to communities is open, non-members can wreak havoc on thematic coherency and disrupt meaning shared among online communities. During the data collection phase of my progun chat room project, Iraqi and other Middle Eastern users writing in Arabic script would co-opt the space during hours when most American members were asleep. This became an interesting phenomenon in and of itself, but the social interaction proved less significant to me as I documented ways knowledge and status was conferred to members (Gregory, 2007a).

Thus, cleaning up the data set can become a manual, if not arduous, process. For this reason, finding nuanced meaning from a data set of Tweets can be a challenge, even with superior social analytics tools and privacy settings lowered (boyd, 2016; Bridges-Rhoads, Van Cleave, & Hughes, 2015; Paulus, Jackson, & Davidson, 2017). It is those privacy settings, though, that shape, if not at times distort, the “data set” as the voices of members disappear under strict privacy settings. It leads a researcher to consider why some members leave their settings Public and others only allow Friends or Followers to engage or read posts. For some members, safety is inextricably linked to privacy. And as online sites become more antagonistic with trolls and hostile bots, privacy becomes the new currency that can block out the observations and data scrapings of the most conscientious researcher from an otherwise meaningful discourse.

To this point, it is relevant to briefly address privacy issues related to methodological research involving data scraping. This technology boosts student expectations of what it can do for them and has made researchers giddy with easy accessible data sets for textual analysis (boyd, 2016). Unfortunately, the tools that are currently available give researchers access to much more than the information they are entitled to use. For instance, without clearly demarcated privacy settings selected, a user’s IP address can be captured for geo-targeting. Most of these activities are unbeknownst to social media users when their email addresses, geo coordinates, posting history, and other backend data are made accessible through these data-scraping tools.

The gathering and use of unsolicited data seem currently justified, even by qualitative methodologists dealing with moderate data sets, through a process of decontextualization of the human subject from the raw data (Bridges-Rhoads, Van Cleave, & Hughes, 2015). Whether this is because of the large number of degrees of separation between the researcher and the user, or because of the automation of the data gathering process from a software application makes these data available and unconstrained to the researcher, it is hard to discern. Nevertheless, I suggest that we hold a conversation about how social analytic technologies such as Tweetreach, DiscoverText, Qualtrics, NVivo’s NCapture, Google applications, and embedded social media aggregators provide researchers with content they should not have the license to use for their own benefit and at the expense of the user’s privacy (boyd & Crawford, 2011). Currently, I am conducting a mixed methods research project concerning ways genetic knowledge influences identity formation and perceptions of health risks. One data source included in my research design protocols involves turning to social

media forums and YouTube videos for some of my data collection. Measures must be in place to assure total anonymity and to prevent backend data from being gathered. An ongoing vigilance must occur, as it is too easy to slip with real IDs, GPS coordinates, IP addresses, and other potential identifiers. For some researchers, these backend data become added value when conducting research on social media communication; however, we must consider the risks involved in such blind faith in the surveillance and data-mining technologies embedded in these applications and devices.

Once data scraping has been performed, the next step in coding involves the use of QDAS (Davidson, Paulus, & Jackson, 2016). Use of QDAS is a common occurrence for many qualitative researchers, but with this technology comes a caveat. The data set in some respect become quantified in terms of thematic codes and nodes and lends to counting frequencies as so often is done with searching for patterns within a data set. Here lies the tension between quantitative and qualitative research (Gregory & DeMott, 2016a, 2016b). Data scraping used for textual analysis gives value to rate of frequency, imposing a numeric value on an otherwise qualitative inquiry. Hence, the qualitative process, even with a relatively small sample of text entries becomes quantifiable, and in some cases reproducible. This practice, therefore, moves the methodology away from descriptive analysis and closer to quantifying social reality.

## **Conclusion**

In this article, I have addressed some issues, but by all means not all challenges that must be considered when teaching or conducting qualitative research focused on online communication settings. The role of in-class exercises is significant in the adaptation of qualitative inquiry to online spaces (Freidenberg, 2011; Whiteman, 2017). As a result, these evolving tenets have the potential to bring forth an added ethical awareness to the role the researcher plays during the design and data gathering phases (Williams, 2012). While I propose some effective practices that I have developed over the years teaching research methods to students and providing methodological support to researchers, what lies ahead for the state of the methodology rests in how we address the role of new technologies in our data collection and research settings, and how we push qualitative research into the 21st century in an ethical and beneficial manner.

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