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Navigating methodological landscapes

Reflexive insights from applied linguistics

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Navigating methodological landscapes

Introduction to the Special Issue

Vinicio Ntouvlis*

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Reflections on doctoral studies commonly frame doing a PhD as a learning process (Lindgreen, Vallaster & Vanhamme 2001; Morrison-Saunders et al. 2005), or metaphorically as a journey (Amran & Ibrahim 2012) that involves following, or better yet making, paths (Brook et al. 2010). This process/journey is not necessarily a very streamlined one. It may go in fits and starts; it is arduous and often confusing; in some cases, it doesn't even end. No matter how we choose to describe it, one thing is beyond dispute: doing a PhD is a lot of work, and part of this work often remains unseen. This Special Issue of the *Wiener Linguistische Gazette* (WLG) aims to shed light on the work involved in applied linguistics doctoral projects. It presents papers by doctoral students for doctoral students, in which the authors reflect on methodological challenges that they had to face and overcome in their projects.

Falling in with the PhD-as-a-journey metaphor, the title of the Special Issue speaks of “navigating landscapes,” specifically landscapes of method. When she first came up with the idea for this issue, Carina

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Lozo observed that thinking about and struggling with method is something that unites us all as (early-career) researchers: it is the landscape on which we all meet. The diversity of research pursuits found under the umbrella of “applied linguistics” is notorious. While it has historically been most often tied with language learning and teaching, applied linguistics is defined primarily by being problem-oriented and thereby bringing linguistics to “the real world” and its many, messy matters. This results not only in a wide variety of empirical foci but also in an openness to insights from other disciplines (Grabe 2010). At the end of the day, though, no matter the exact focus and direction of their studies, researchers always have to grapple with choices regarding the methods through which to approach “the real world.” This grappling may be especially challenging for doctoral students, who have to make such decisions while also juggling the pressure and expectations associated with getting an academic degree and emerging at the other end of this process as “scholars” (Brook et al. 2010).

Through this Special Issue we wanted to give PhD students like us the opportunity to reflect on this, both in their texts and in an accompanying reading workshop, held on 27-28 September 2023 in Vienna. The Workshop was designed to discuss the issue of reflexivity in early-career scholars’ work and to provide room for collective debate, insights, and feedback on early drafts of the papers submitted. Besides the authors whose work is featured here, the Workshop was attended and supported by special guests Brigitta Busch and Jonas Hassemer, whose invaluable input helped shape the final versions of these articles. We are grateful for their participation, which fostered more open dialogue among us and strengthened our efforts to critically reflect on our projects’ methods from a variety of angles. This diversity of perspectives is reflected in the issue’s articles.

In the opening paper, **Carina Lozo** reflects on the challenge of bringing together in her project two disciplinary angles that seem to be at odds with each other: acoustic phonetics and interactional sociolinguistics. While the former is characterized by a positivist epistemological stance and an emphasis on controlled laboratory settings, the latter

seeks to analyze naturalistic, “authentic” data in situated ways. Carina argues that not only is it practically difficult to operationalize this combined approach (e.g., how does one find data, and what kind of data?), but the epistemological clash of the two traditions may raise questions for the researcher herself and her identity as an (early-career) academic – an often overlooked struggle.

Roshanak Nouralian in turn focuses on another type of struggle that is not talked about very often: the work of familiarizing oneself with new approaches in the midst of one’s doctoral studies. Roshanak describes how she came to conceptualize her project as a transdisciplinary effort by deciding to adopt methods from Grounded Theory. This involved getting acquainted with the approach from scratch and eventually having to weigh which practices from Grounded Theory research would be best suited to her own work. Roshanak’s paper thus stresses how narrow disciplinary paths may not be the way to go for doctoral students, and how exploring new territory brings its own questions and challenges, which ultimately enrich one’s experience and the resulting academic output.

While Grounded Theory involves metaphorically going where the data takes us, **Florian Grosser** writes about literally going places to “follow the data.” His paper reflects on (junior) researchers’ mobility and its emotional repercussions related to drawing precarious divisions between “the personal” and “the public.” The participants in Florian’s ethnographic project lived in Japan and his engagement with them necessitated traveling to another continent to conduct his study. Drawing on diary entries he wrote over the course of his fieldwork, Florian traces how the complexities he had to contend with affected him and his research process. He specifically examines his assumptions on the separation between “personal” involvement with his project’s participants (who he was previously acquainted with) and his professional interest in studying their (meta)communication. All this while the Covid-19 pandemic also affected his travel plans, contributing an additional layer of practical challenges.

In my own contribution, I (**Vinicio Ntouvlis**) also deal with the practical challenges of ethnographic work, but in this case the ethnographic effort was not rooted in physical but in digital spaces. The paper discusses the process of finding willing interviewees in my study of Facebook groups by contacting them online. I argue that the channel one chooses for approaching people to interview is a generally under-discussed yet important factor in the establishment of a research relationship. This is due to media ideologies, which are an unavoidable aspect of digitally mediated communication (DMC) and its study. At the end of the day, interviewee recruitment involves one person (the researcher) reaching out to other people. When the two parties communicate through digital media, considering the media themselves and how people relate to them becomes essential for the digital ethnographer.

Finally, **Jenia Yudytska**'s paper also frames the study of DMC as a people-centered matter by focusing on ethical issues. In her corpus-driven study on the effect of communication device on language use, Jenia analyzed her participants' writing across both public ("Twitter/X") and private channels (Discord). Therefore, if her participants' anonymity was compromised, their private messages (besides their public ones) could be traced back to them. This necessitated taking measures beyond the routine practice of pseudonymizing users. Through her discussion, Jenia highlights that to ensure her project's ethical integrity, the researcher must make dynamic and creative decisions, avoiding one-size-fits-all approaches and weighing academic interest against her duty to safeguard people's privacy.

Taken together, the papers in this Special Issue paint a picture of the difficulties doctoral students of applied linguistics face in the methodological implementation of their diverse research pursuits. This picture is drawn by doctoral students for the benefit of doctoral students as well as other applied linguistics researchers dealing with similar questions. Despite their widely divergent topics, all these articles are devoted to "saying the quiet part out loud" when it comes to the work that doing a PhD entails. We have strived so that these students' voices could be heard loud and clear.

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Bridging disciplinary demands

From bias to balance in integrating interactional sociolinguistics and acoustic phonetics

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Abstract

Dieser Beitrag befasst sich mit den Herausforderungen, die sich aus den unterschiedlichen Ansätzen zur Datenerhebung in der akustischen Phonetik und der interaktionalen Soziolinguistik ergeben, sowie mit dem Versuch, diese Bereiche in dieser Hinsicht zu verbinden. Das Hauptaugenmerk liegt auf der Zusammenführung unterschiedlicher Datenerhebungsmethoden und der Beleuchtung ihrer methodologischen Lücken. Der Beitrag reflektiert kritisch die Integration von akustischer Phonetik und interaktionaler Soziolinguistik innerhalb eines Forschungsprojekts, das die Rolle der Stimme in Gender-Performances untersucht.

Schlagwörter: Interdisciplinarity, reflexivity, phonetics, interactional sociolinguistics

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1 Introduction

“I’ve never really thought about authenticity, we all just assume that the interactions we put the speakers in are genuine,” remarked an accomplished phonetician when I asked about how they ensure authentic interactions in their data collection process. This nonchalant response left me contemplating, as my PhD project seeks to investigate “authentic” or “real life” interactions from a phonetic perspective and at this point, I had invested quite some time in deciphering the essence of data authenticity.

The phenomenon of the human voice, with its intricate interplay of mechanics, functions, limitations, and its diverse roles in social interactions, has been a subject of interest across disciplines for decades. This fascination with the voice extends from medical domains to philosophical discourse, where the voice’s enigmatic nature has often fueled multidisciplinary investigations. In the framework of my PhD project rooted in applied linguistics, I intend to assimilate different perspectives with the aim of understanding the voice as a social practice. In this effort, I draw on various disciplines such as philosophy, linguistic anthropology, phonetics, and interactional sociolinguistics; my primary focus, however, remains constant: understanding the voice as a mechanism intricately tied to gender performance. This paper focuses on acoustic phonetics and interactional sociolinguistics, which form the cornerstones of my corpus collection and, consequently, should be the primary focus of this contribution.

My academic journey into this field, which I tentatively term “sociophonetics of the voice,” was driven by both personal curiosity and scholarly interest. This blend of personal intrigue and academic pursuit paved the way for my exploration of the nuances of human interaction and the physical manifestation of identities through voice. On a personal level, I have always been fascinated by the intricacies of these phenomena. Simultaneously, my academic interest has been drawn to the intersection of voice with culture and identity and how it is reflected on a physical level, one that could be quantified. With my formal academic training in applied linguistics and a background in phonetics,

I felt prepared for the tensions I expected to encounter. However, with time, it became evident that these tensions required a deeper engagement than I initially anticipated. It was at this point that I realized that the inherent reflexivity of applied linguistics had been somewhat lost on me as I wanted to transcend disciplinary boundaries.

This contribution addresses the unique challenges that arise from the contrast in data collection methods between acoustic phonetics and interactional sociolinguistics, as well as the effort to bridge these fields in this regard. Acoustic phonetics is rooted in experiments within controlled settings, whereas interactional sociolinguistics places a premium on the unembellished interpersonal communication found in unscripted, spontaneous conversations. The latter posits a fundamental aversion to staged interactions, stressing the significance of uncontrived communicative exchanges. This juxtaposition describes the challenge at hand – how to harmonize the different demands of acoustic phonetics and interactional sociolinguistics.

To achieve this goal, I strived to design an experimental data collection setup that could serve the requirements of both fields. The benefit of the integration of acoustic phonetic analysis within interactional sociolinguistics can be seen as crucial for enriching the understanding of conversational data. Addressing an underexplored territory within sociolinguistics, the challenge lies in quantifying nuanced sociolinguistic phenomena, such as the intricacies of vocal gender performance. Ultimately, my project aspires to contribute to the development of a gender-neutral synthetic voice, and thereby highlights the need to understand gender-linked metrics that phonetic analyses could provide. This convergence of requirements prompts a reevaluation of disciplinary boundaries, advocating for an inclusive, interdisciplinary approach. This shift challenges common hierarchical preferences for quantitative over qualitative methods, aiming for a more balanced research framework. Integrating acoustic phonetic analysis in sociolinguistics and vice versa, infusing sociolinguistic insights into phonetic

analysis, uncovers hidden dimensions in interactional data and prompts a reassessment of entrenched disciplinary norms.¹

In what follows, I will first present the theoretical framework that underpins my corpus collection (Section 2). Section 3 delves into a reflexive account, addressing the navigation of biases encountered in bridging the disciplinary demands stemming from sociolinguistics and phonetics. In Section 4, I discuss the conditions required for building corpora and the methodological choices that guided this process. Moving forward to Section 5, I discuss the data generizability of the collected corpus. Finally, in Section 6, I conclude this paper by summarizing implications drawn from this interdisciplinary exploration.

2 Theoretical framework

This section navigates the interdisciplinary blend of interactional sociolinguistics and acoustic phonetics. Subsection 2.1 delineates the contrasting methodologies and perspectives of these fields: interactional sociolinguistics focusing on social dimensions in language use, and acoustic phonetics emphasizing quantifiable speech analysis. The discussion further explores, in 2.2, the multifaceted concept of “authenticity” within experimental setups, acknowledging its dynamic nature and relevance in capturing genuine social interactions.

2.1 Contrasting approaches

The decision to combine interactional sociolinguistics with acoustic phonetics in the study of gendered voices is rooted in the comprehensive nature of these two disciplines. The juxtaposition of these fields not only enhances the understanding of how gender is constructed and

¹ It must be noted that phonetic analyses have historically repeatedly been employed in sociolinguistics, particularly within the variationist framework. However, I seek to differentiate my approach from this tradition, as the objectives of variationist sociolinguistics diverge from the broader epistemological foundations that guide my research project.

expressed through language use and its acoustics but also paves the way towards a gender-inclusive synthetic voice landscape.

Interactional sociolinguistics emerged in the latter half of the 20th century and builds upon the foundations of sociolinguistics and conversation analysis. The field stems from the recognition that language is a social practice embedded in various contexts and focuses on examining the different sociocultural factors that influence language use, including gender, social identities, and social norms. The primary objective of interactional sociolinguistics is to shed light on the complex relationship between language and society by analyzing the nuances of communication in “real life” situations and interactions (Hinnenkamp 2018; Imo & Lanwer 2019; Rampton 2020). “Real life” interactions in this sense signify the unscripted exchanges among individuals, which occur within their everyday environments.

Exploring gendered voices within interactional sociolinguistics unveils complex relationships among voices, gender identity, and the fabric of social dynamics. Methodologies such as discourse analysis, playback interviews, and microanalysis play an important role in decoding the nuances of gender performance embedded within vocal expressions. These approaches serve as invaluable tools, offering insights into the multifaceted dimensions of how gender manifests and evolves within the realm of spoken language. Playback interviews serve as a complementary tool, offering participants an opportunity to reflect upon their linguistic choices, intentions, and underlying motivations during recorded interactions. They provide a retrospective lens, for the researcher and the participant, allowing for the examination of conversational snippets, unveiling hidden layers of gender expression within speech. Microanalysis explores the granular elements of speech, meticulously scrutinizing phonetic and prosodic features to unravel the gendered nuances imprinted in vocal communication. Collectively, these methodologies within interactional sociolinguistics offer a comprehensive toolkit for understanding the complexities inherent in gendered voices.

In tandem with interactional sociolinguistics, acoustic phonetics, the study of the physical properties of speech sounds, provides a quantifying framework to explore the acoustics of gendered voices. Its primary goal

is to understand the mechanisms and variations in speech production, as well as the auditory aspects of speech perception (Harrington 2010). Assessing the acoustics of human voices involves evaluating various domains within the voice's acoustic signal, including *periodicity*, *noise*, and *amplitude relations*. Periodicity, representing the frequency of the glottis' opening and closing cycle, finds expression primarily in the fundamental frequency (Fo), associated with the perceived pitch of the voice. When considering noise within the voice signal, measures focus on quantifying the additive noise present alongside the harmonic segments. One common metric used for this purpose is the harmonics-to-noise ratio (HNR), which delineates the relationship between harmonic and non-harmonic portions of the signal. This measure is particularly relevant in analyzing voices characterized by creakiness for example, where a heightened degree of noise is evident. Amplitude relations provide further insights, albeit multifaceted, depending on the specific relations under consideration. In the sociophonetics of the voice, examination often involves assessing amplitude differences between specific harmonics, such as the first and the second harmonic, H₁-H₂, and the second and the fourth harmonic, H₂-H₄. These amplitude relationships offer intricate details: H₁-H₂ variations, for instance, signify pronounced glottal opening and tend to manifest in breathy voices. Conversely, H₂-H₄ measurements are indicative of glottal tension, typically observed to be higher in male speakers compared to females (Keating et al. 2015).

Interactional sociolinguistics delves into the social dimensions of everyday language use, employing qualitative methods that prioritize contextual understanding of nuanced social interaction. While sacrificing statistical accuracy or broad generalizations, these methodologies aim to grasp the nuances of social dynamics in interactional settings. In contrast, acoustic phonetics relies on quantitative measurements to derive quantifiable outcomes and broad insights into speech acoustics. However, this emphasis on quantifiability may sometimes overlook the organic nature of social interactions, focusing more on physical measurements and potentially missing the richness of everyday experiences.

Despite their differing approaches – quantitative and qualitative, respectively – both fields converge in their exploration of language, albeit from distinct vantage points.

By merging these disciplines, I aim to holistically investigate how gender identity is shaped socially and manifested acoustically in vocal communication. This interdisciplinary perspective bridges the gap between the social and physical aspects of communication, merging quantitative and qualitative approaches to understand language and social interaction.

2.2 “Authenticity” in experimental settings

This section is dedicated to outlining my stance on “authenticity” and presenting how I will approach the concept within the scope of my work. In my pursuit of spontaneous and unscripted interactions, conventional setups for phonetic research, which typically include sociolinguistic interviews, proved inadequate. While De Fina & Perrino (2011) advocate for “authenticity” within an interview context, as it presents a legitimate social interaction, I could not presume that such controlled environments would encapsulate the “real life-ness” I strive to capture. My focus gravitated towards capturing speech that is unrestricted and casual to a level that goes beyond what can be replicated in a controlled sound booth environment. Hence, I am interested in interactions that occur in the daily lives of speakers, where the “speaker does not reflect on their existence but merely exists” (Kramsch 2012: 486). The quest for “authentic” or “natural” everyday interactions stands at the intersection of debate and complexity. These seemingly straightforward terms laden with ideological underpinnings, have meanings shaped by individual beliefs, societal norms, and cultural contexts. The understanding of what is deemed authentic or natural varies across different research cultures but usually refers to the quality of being “genuine” or “real.”

The notion of “authenticity” in sociolinguistic research is often intertwined with discussions about identity, power dynamics, and

representation, rendering it a nuanced and ideologically charged concept. This concept, however, acquires a new dimension when applied to linguistic data itself in the context of my study, where I combine two fields with ontological and epistemological differences. The data we collect, once considered a reflection of “unfiltered” linguistic expression (Labov 1972), is now recognized as a product of conscious and context-dependent choices made in its collection and interpretation (Eckert 2014). To critically examine “authenticity” in social interactions and what it means for my data collection process, is to unravel its nuanced nature, recognizing it not as a fixed entity but as a dynamic and context-dependent phenomenon (Lacoste et al. 2014). The “authenticity” of social interactions is embedded not just in the linguistic choices of the speakers but also in the methodological decisions of the researcher. As highlighted by Buchholtz’s (2003) problematization of the concept, the claim for “authenticity” is inherently relational, never total but always partial. Further, it is produced through contextually situated and ideologically informed configurations of self and other.

The importance of “authenticity” extends beyond social interactions. The transition from the “authenticity” of social exchanges to the data collection settings demands precision without sacrificing the spontaneity inherent in everyday discourses. “Data authenticity,” then, becomes the conduit translating interactions into a corpus reflecting spontaneous linguistic expressions, contextual intricacies, and everyday conversations. This transition embodies a dichotomy: data authenticity must represent both the social interactions and the setting they emerge from.

Acknowledging the changing concept of authenticity in sociolinguistics (cf. Androutsopoulos 2015; Coupland 2003; Lacoste 2014), which primarily focuses on speakers and their linguistic expressions, I extend scrutiny to the authenticity of the data collection process itself. The “deconstruction of authenticity” in sociolinguistics, as termed by Androutsopoulos (2015), extends beyond recognizing authenticity as a socially constructed phenomenon instead of an inherent attribute. It also prompts a reevaluation of the conventional understanding of an “authentic speaker,” as this deconstruction advocates for a significant expansion in the scope of analytic objects. It thus encompasses various

interactional settings where authentication processes are observable and influential. This shift in focus recognizes that data is a construct shaped by the researcher's decisions and the surrounding context.

To better describe the setting I seek, I want to broaden the concept of an "inherent authenticity," which categorizes objects or settings as either authentic or inauthentic, through a notion of ethereality. This notion describes the intangible essence arising from the interconnectedness of the researcher, participants, and the experimental setting. Consequently, it acknowledges that the authenticity of both data collection setup and the data itself is discursively co-created. This notion addresses the evolving complexities of understanding "genuine" social interactions, capturing their dynamic and context-dependent nature within this interplay. It emerges as pivotal in describing the social interactions I seek for my corpus. It underpins my methodology, bridging the gap between conventional data collection approaches and the ever-evolving dynamics of human engagement. In this sense, authenticity with an ethereal aspect refers to a distinctive genuineness that eludes replication. This expansion of the conventional understanding of authenticity underscores the irreplicable nature of the interactions I seek. It acknowledges the unique, ephemeral quality that permeates real life interactions, emphasizing their connection to the everydayness and transience of human engagement.

3 Navigating biases and interdisciplinary collaboration

My project seeks to blend acoustic phonetics and interactional sociolinguistics by uncovering a shared ground where both fields can coalesce, thereby shedding light on their methodological blind spots. To navigate this intersection effectively, it is crucial to address the biases and challenges that arise.

First, it is essential to acknowledge that, as a researcher with a more positivist background steeped in phonetics, my initial inclination naturally gravitated towards constructing a corpus that catered more to phonetics' requirements. This gravitational pull was, in part, driven by

my inherent comfort and familiarity with the acoustic intricacies, controlled environments, and instrumental setups characterizing phonetic data collection. This familiarity inevitably led to a degree of caution that was reflective of my training and perspectives within the discipline of phonetics. This self-acknowledged bias towards phonetic criteria necessitated an introspection – an examination of how this orientation might inadvertently overshadow the nuances cherished by sociolinguistics, particularly those stemming from unscripted and everyday interactions. The potential for my biases to overshadow the methodological choices informed by sociolinguistic principles served as a clarion call for critical self-awareness.

Despite being advocated and encouraged, the practice of self-reflection is conspicuously absent from formal academic training. However, as a PhD candidate, I frequently find myself immersed in reflective contemplation and a continuous reevaluation of stances and choices remains an enduring aspect of my academic trajectory, at times arising from an intrinsic motivation to preempt potential critique.

In the beginning, as I stepped into my role as a researcher, I underestimated the impact it would have on my perspectives and my understanding of the research process. Especially in the context of data collection, as my background in experimental phonetics provided ample prior experience. At the outset, I wanted to be a mere vessel for results, a neutral figure devoid of personal inclinations or needs. In this view, I saw myself as a smooth, unobtrusive surface, akin to a conductor in the realm of electrical circuits – simply transmitting data.

However, reality took a different shape. The challenge arose when I found it increasingly difficult to cleanly separate my personal identity from my research persona. These two facets of my life, which I had assumed could be neatly compartmentalized, became inexplicably intertwined. This confluence of identities is not a novel experience for seasoned academics and it raises questions about the extent to which we, as researchers, are truly “objective and detached” from our subjects of study. It forces us to confront the complex interplay between our personal motivations, biases, and the pursuit of academic knowledge.

As I navigated the line between catering to the phonetic demands and incorporating the spontaneity valued by sociolinguistics, it became evident that each decision I made was underscored by an ongoing dialectic. This dialectic was marked by a constant negotiation of the tensions arising from my inherent biases while striving to remain faithful to the broader interdisciplinary goals of the study. Not being aware of my inherent biases, I proceeded with the presumption that gathering sociolinguistic interviews within the confines of an acoustic laboratory would suffice for the sociolinguistic aspect of the corpus. Also, a certain perseverance influenced my perspective, as I maintained that the notion of “requirements” was best suited to the realm of experimental phonetics – a domain I felt more aligned with.

Through exchanges with other scholars from the field of phonetics, such as the quote in the beginning of Section 1 shows, a realization emerged that the pursuit of “real life” speech ultimately is secondary to precise, reliable, and quantifiable data. It became evident that, while the desire for “real life” data remains commendable in the field, the pragmatic realities of research often fail to find a balanced compromise between the aspiration for real life data and the practical considerations of ensuring data reliability and measurability. Through these academic discussions, I recognized that, while authenticity’s inherent value is acknowledged, it is often the pursuit of methodological accuracy that shapes the contours of research practice. This is when I realized that the standards I had established for my project stood in contrast to the principles upheld within phonetics.

While I appreciated the discussions and outcomes of exchanges with phoneticians, my reflections were notably enriched by engaging with researchers from other linguistic domains – dialogues that directed me to a more comprehensive grasp of linguistic interaction. Through these conversations, my understanding of the sociolinguistic perspective deepened, as I came to recognize the merit of unscripted conversations as vital portals into understanding the intricate fabric of the human voice. This perspective led to a recalibration of my approach – one that placed a high value on unstaged discourse as an indispensable conduit for exploring vocal variation in its myriad forms.

Now, to create a corpus that would effectively integrate both acoustic phonetics and interactional sociolinguistics, a precursor involved the reflective account above. This account marked a departure from my initial inclinations. I needed to acknowledge that my past perspectives, while rooted in principles of scientific objectivity, had the potential to obstruct my further exploration of the voice, which I was planning.

This awareness underscores the pivotal role of reflexivity in scholarly endeavors. It captures the journey from one's own momentarily obscured biases toward a realization that emerges through a dynamic interchange of perspectives, conversations with colleagues, and the recognition of one's own academic foundations.

The outcome of this thought process, the corpus described below, is in itself emblematic of the inherent growth that academia fosters. It reminds us that, through our academic endeavors, maintaining an open mindset and the willingness to recalibrate are essential companions on our intellectual journey.

Ultimately, the journey from biases to a more balanced and appreciative standpoint was catalyzed by dialogues within the research community. Engaging with other scholars not only grounded my research within a broader linguistic narrative but also underscored the profound significance of interdisciplinary collaboration. Through this exchange of insights, the study's methodological approach evolved from an individual self-dialogue into a collective endeavor.

4 Divergent approaches to data collection

This section explores contrasting approaches in linguistic data collection. It starts by examining the paradox of observing human behavior in the social sciences, pivoting towards contrasting perspectives on performance (4.1). Then the section transitions to two lenses in 4.2, acoustic phonetics and interactional sociolinguistics, by highlighting disparities in data collection methodologies, revealing intentional deviations from each other's foundational principles. Section 4.3 concludes with the

methodological choices made and the presentation of the data collection set up.

4.1 Contrasting performance

Viewed through a quantum physics lens, we confront the unsettling notion that “the observed is not objective,” a concept that challenges the foundation of our social scientific endeavors, which aspire for objectivity. A realization that forces us to grapple with what is known as the *observer’s paradox*. This dilemma, summarized by Labov, underscores the inherent predicament in collecting linguistic data: “The aim of linguistic research in the community must be to find out how people talk when they are not being systematically observed; yet we can only obtain this data by systematic observation” (Labov 1972: 209).

With Goffman, however, a nuanced perspective can be introduced. His theory, which is aptly captured in the German translation of his seminal work “The Presentation of Self in Everyday Life” (1956), portrays social interaction as a dramatic stage: “Wir alle spielen Theater” (‘we all play theatre’). In this metaphor, individuals consciously or subconsciously perform roles for others, meaning that our actions and expressions are performative, similar to actors on a stage. This perspective acknowledges that while the act of observing inevitably influences behavior, it also underscores the inherent performative nature of social interaction itself. Just as actors on a stage engage in performances, our interactions in the social realm inherently bear a performative aspect, influenced by the awareness of being observed. While not entirely escaping the observer’s paradox, this does offer a new lens through which to consider the intricacies of human interaction. Within this framework, the desired “natural” or “authentic” interactions sought by sociolinguists are consistently veiled by a certain level of performativity on the part of the speakers, which remains constant and cannot be “turned off.”

Having explored the complexities of observation within social interactions, I want to shift the focus now to contrasting perspectives

on performance. Viewed through both phonetic and interactional sociolinguistic lenses, distinct focal points emerge, highlighting diverse approaches to understanding this concept.

Phonetics, emphasizing the physical and acoustic properties of speech sounds, scrutinizes the articulatory mechanics and acoustic manifestations of speech production. It investigates the physiological aspects of how sounds are formed within the vocal tract, the variations in phonemes, and the acoustic signatures of individual speech units. Performance, within phonetics, revolves around the execution of speech sounds – its articulatory precision and acoustic properties – often in controlled settings, aiming to comprehend the mechanics of sound production.

On the other hand, interactional sociolinguistics takes a broader, socially embedded approach to performance. It views performance as more than the mere production of speech sounds; instead encompassing the ways individuals navigate social contexts through language use. Interactional sociolinguistics scrutinizes how language performance reflects and shapes social identities, how individuals strategically employ linguistic resources within conversations to negotiate relationships, convey social meanings, and adapt speech patterns according to the situational and contextual demands.

Conversely, while phonetics aims to understand the physical and acoustic intricacies of speech production, interactional sociolinguistics widens the scope, exploring the social and cultural dimensions within diverse social contexts. These perspectives together offer a comprehensive understanding of performance, integrating the physiological mechanics of speech production with the socially embedded nature of linguistic interactions.

4.2 Disparities in corpus collection

Building on these conceptual reflections, I will now explore the practical requisites for data collection. In attempting to reconcile these approaches, it appears that each field purposefully veers away from the

core principles upheld by the other. The requirements of an “ideal” corpus in interactional sociolinguistics surpass the participant’s role as a mere subject of study. For instance, inviting individuals into a controlled laboratory setting solely to record their speech within an interview situation presents inherent challenges. Central to my approach is the principle of minimizing staging and artificiality during data collection, with the goal of capturing unscripted and spontaneous interactions. This aspiration encounters the practical challenge of capturing everyday human communication.

In contrast to this, acoustic phonetics operates within the realm of structured interactions. Here, the emphasis is placed less on the content of the language used and more on the manner in which it is articulated. Striving for precision in the recording of speech, phonetic experiments often rely on controlled settings featuring sound-dampened environments and specialized microphones engineered to capture speech at a high quality. This approach is pivotal to ensure that the data remains easy to process when extracting physical measurements.

As mentioned above, acoustic phonetics adheres to stringent criteria due to the significant susceptibility of data to contamination, e.g., by background noise. These disturbances manifest in the acoustic signal and can have an impact on spectral measurements, complicating the differentiation between desirable and undesirable noise components. To address this challenge, controlled experiments are conducted within sound attenuated booths, ideally with sole occupancy by the speaker with minimal movement, while the experimenter operates externally, talking to and instructing the speaker through a microphone-headphone conduit. This arrangement creates a controlled environment that facilitates the capture of speech acoustics in as “clean” a state as possible. By “clean,” I refer to acoustic signals that are free from distortions, clipping, or excessive background noise.

Within the scope of my corpus, I tried to uphold the “no background noise” principle primarily due to practical considerations, as the process of cleaning noisy speech data is time-intensive and can also be quite challenging. Concurrently I was trying to transition from the confined

laboratory environment towards a more open and unrestrictive environment, also allowing more participants into the setting.

In my exchanges with scholars from the field of speech acoustics, it was frequently emphasized that, over time, participants in controlled experimental settings, exhibit, to some extent, a tendency to become less conscious of the experimental environment, replete with cables, microphones, and screens. This perspective suggests that this setting becomes “authentic” to speakers or participants over time, although it may not fully align with the criteria typically emphasized within an interactional sociolinguistic framework. This is why the objective shifted towards finding an interactional context that would facilitate meaningful multi-party engagement, marked by minimal movement, a quiet background, unobtrusive microphone use, and a crucial emphasis on the inherent everydayness of the setting. In my data collection setup, I wanted to capture types of interaction that are direct, emergent, and inherently spontaneous and unscripted. The objective was to peel away the layers of artificiality that can accompany scientific framing and experimental goals, creating a space where spontaneous exchanges can thrive. Thus, the experimental setting should be stripped of any excessive staging, a conscious decision rooted in the belief that too much structure can impede the flow of interactions. This approach recognizes that an overly structured environment, laden with predetermined expectations or experimental constraints, can potentially stifle interpersonal encounters. An obvious first choice for the setting was the recording of a friend group who might overlook cables and microphones due to their familiarity with each other. However, the recording a friend group was initially dismissed, given the inherent challenge of providing each speaker with an exclusive microphone channel since cross-talk interference posed a significant concern, potentially undermining the quality of subsequent phonetic analyses. Thus, another essential criterion emerged, stipulating the need for individualized signal channels for each speaker to ensure the fidelity of the data. Finding a compromise between the desire for a spontaneous interactional setting and the technical constraints was essential. Recognizing the necessity of individual

microphone channels, I sought a solution that would enable the collection of conversational data while preserving the data's reliability and the ability to conduct thorough phonetic analyses.

Still casting a shadow, the pandemic paved the way for one of the initial viable suggestions that were presented to me:² the recording of a Zoom meeting – an action that would not have been considered as an everyday interaction just a few years ago. Yet, the idea of recording a friend group hinged on the requirement that the interactions happen organically, without any scripted prompts. Consequently, the option to record a Zoom meeting was ruled out rather quickly, as using Zoom for a group conversation resembled the staged environment of laboratory recordings. Nevertheless, this online setup did provide a valuable feature: Individual microphone channels, which I found essential.

4.3 Methodological choices and resulting corpus

After exploring various technical options, an online gaming setup was devised that allowed for both spontaneous interaction and the recording of clear, distinct audio signals from each speaker. This enabled the research to maintain its focus on interaction while ensuring the methodological accuracy required for robust phonetic analyses. In this way, the research project evolved, incorporating the insights from both interactional sociolinguistics and acoustic phonetics, and finding a balanced approach that respects the core principles of both fields.

A pillar of my corpus lays on the technical competence of the participants. The requirement for individual microphoning added a layer of complexity to the participant selection process, necessitating a more intricate approach beyond a simple random grouping of friends. The participants were required to possess a degree of technical proficiency, enabling them to independently manage their recording processes, ideally with a sensitivity for audio processing.

2 Another idea presented to me was, “let’s make couples fight” – something which, from a scientific perspective at least, was worth considering, as conflict often proves to be an effective distractor in laboratory settings.

At the outset, I found myself grappling with an inclination to cease from personal involvement in the corpus – a reluctance stemming from the scientific ideologies that I, as an experimental phonetician, had internalized. This originated from the belief that a researcher’s disengagement from the subject matter lent a particular “purity” to the investigation. The transformative pivot came in acknowledging that my dual identity as a researcher and participant did not compromise the scientific rigor I held dear, but rather elevated it. An immersion into the experiment served as a profound counterpoint to my earlier opposition.

With the immersion I transitioned into an ethnographic research context. However, it is worth noting that this immersion was not in a traditional ethnographic sense; instead, it was an attempt to exert a degree of influence on the setting. This transition comes with its considerations. As I adopted a more immersive stance, I recognized the impact of my presence and actions on the experiment environment. Balancing involvement and control became pivotal to ensure that my influence did not disrupt the flow of the interactions.

This change in approach notably shaped the recording process, where eventually a close-knit online gaming friend group became the focal point of the study. The group consisted of five people, three female (one of which was me) and two male, all around the age of 30. Each speaker recorded their audio in their own home, using the same setup they were accustomed to during their typical online gaming sessions. Through a Discord server (Discord Inc. 2023),³ all speakers were connected and were able to talk to each other. Within Discord, users can create or join servers, which are dedicated spaces for discussions or collaboration. Servers can be customized with different channels for text or voice communication, allowing users to discuss specific topics or to engage in certain activities. The recordings were set up to resemble a gaming session, mirroring the environment familiar to the speakers. This setup included a specific voice channel within the Discord server,

3 Discord is a communication platform primarily designed for creating communities and enabling voice, video, and text communication among users. It is commonly used by gamers.

allowing the speakers to engage in real-time conversation. They each employed an external microphone connected to their computer along with a recording software to capture the sessions. The communication was exclusively through voice chat, without the use of text chat or any other channels.

In this manner, on three different occasions (excluding one pilot run), we played a survival game that the friend group regularly played, *Valheim*. The corpus emerged from conversations that transpired within this gaming/Discord server environment. While the gameplay acted as the catalyst for gathering, the conversations swiftly shifted towards everyday topics. The participants navigated discussions that traversed beyond the realms of gaming mechanics or strategies, delving into personal anecdotes, reminiscences from the past, work-related matters, and various facets of everyday life. These conversations provided a window into the flow of conversations among friends, capturing the nuances of language use, social dynamics, and the interplay of speech elements that transcend the gaming context. Despite the initial gaming premise, the resultant corpus reflects real life interactions among friends, showcasing the intricate fabric of everyday communication and the multifaceted nature of linguistic interactions.

Regarding ethical considerations, I ensured that the speakers were well-informed about the consent process, with the understanding that they could retract their consent at any time. They were explicitly notified that their transcribed conversations would undergo both discourse analysis and phonetic analysis. Additionally, any personal information within the output text has been either removed or pseudonymized in accordance with privacy measures.

Despite the intention to shift away from the confines of the laboratory, my efforts unintentionally but inevitably transplanted certain laboratory conditions into participants' homes. This is particularly evident in the complex role participants play in instrumenting the setup. While promising, this approach is constrained by the demand for professional expertise or necessitates substantial participant training. Moreover, the diversity of home environments introduces various external interferences, such as the varying noise levels emitted by

laptops as they heat up. Consequently, considerable post-processing of signals remains a necessary step. However, in light of the “everyday” attributes I seek, this post-processing is a compromise I must accept. Regardless of these challenges, my optimism remains, as this corpus merely marks an initial step toward future linguistic inquiries, offering a chance to capture the essence of “speech in the wild.”

5 Methodological impact on data validity and generalizability

At first glance, the collected data appeared somewhat disorderly, necessitating various post-processing steps such as aligning the separate signal channels in order to get the accurate timing of the interactions.

In order to be able to mix five different channels, a time-stamping procedure was carried out, as well as a noise profile assessment for each individual speech signal to facilitate a proper denoising procedure in the post-processing stage. For the desired acoustic precision, these post-processing procedures were essential. Through the noise profile, I could identify a baseline noise originating from each participant’s computer. However, complexities emerged due to the intensifying computer noise throughout the recordings, necessitating a denoising process in different parts of the signal over each recording. This is when the question of generalizability surfaced.

Further, the inherent spontaneity of the recorded interactions introduced other unpredictable elements, such as keyboard strokes, mouse clicks, and human noises like laughter and exclamations, which pose challenges for phonetic analyses. These exclamations and laughter, however, can also be referred to as *response cries*, a concept introduced by Goffman (1978). Response cries refer to involuntary and spontaneous vocalizations or verbal expressions that individuals produce in response to a situation or stimuli. These are not premeditated or consciously planned utterances but are rather immediate and often reflexive responses to a particular moment. Goffman argues that these response cries are socially significant and are important for understanding the dynamics of social situations. The insights provided by

Aarsand & Aronsson (2009) in their analysis of gaming interactions add depth to understanding the dynamics of unscripted interactions. The authors explored how response cries, along with active noising (e.g., singing along, sound effects) and metacomments, contribute to the establishment of intersubjectivity and a sense of drama in gaming interactions. In essence, response cries serve as the sought-after markers of the interactional atmosphere I aim to capture. These vocalizations testify to the spontaneous, unscripted nature of the setting and present an acoustic phenomenon that one field attempts to evade while the other requires it.

Of particular interest is the heightened variability in the acoustic dimensions, which serves not merely as an artefact but rather as evidence of the everydayness and ethereal authenticity in this home-based setting. This observation suggests a reimagining of phonetic research – one that transcends laboratory confines and embraces the expansiveness of “real world” contexts. But how is this high variability to be treated? Normalizing the data would be probably the answer in many scholarly exchanges. However, normalizing data in this context is unsubstantiated. Firstly, the intention of normalizing is often to minimize variations and standardize data to facilitate comparisons and statistical analyses. However, in a dataset characterized by diverse contexts, interactions, and individual speaking styles, normalization could potentially remove crucial nuances and unique features that are inherent to the real world communication setting I try to capture. Secondly, attempting to normalize highly variable data might lead to distortion. Spontaneous conversations are replete with idiosyncratic features that contribute to their richness. Normalization could inadvertently erase these distinctive elements, rendering the data less representative of actual communicative experiences. Moreover, normalization presupposes a certain level of consistency or regularity within the dataset, which may not align with the inherent variability of spontaneous, unscripted everyday interactions. Applying normalization techniques might result in artificially homogenized data that does not accurately reflect the complexity and diversity present in “real world” speech. In

this context, recognizing dataset variability as an asset rather than a limitation may lead to more insightful results.

6 Conclusion

In summary, this paper was motivated by the pursuit of a form of authenticity in my data collection process, with a focus on highlighting a non-replicable aspect of interactional context. This exploration into the sociophonetics of the voice emerges from a blend of personal intrigue and scholarly interest, resulting in an interdisciplinary endeavor marked by both challenges and opportunities that transcended disciplinary boundaries. A central challenge encountered revolves around reconciling the disparate approaches to data collection in acoustic phonetics and interactional sociolinguistics. While the former thrives on controlled experiments, the latter values unscripted and spontaneous discourses, rejecting staged interactions all together.

As technology continues to reshape our interactions, linguistic data collection in “real life” environments becomes increasingly feasible, with virtual and physical boundaries blurring. This digital integration offers new opportunities for observing and recording conversations in online spaces, creating a platform to address the tension between “real life-ness” and precision in data collection. The pandemic-induced shift to online interactions has accelerated these opportunities, though it has also introduced inadvertent laboratory-like conditions in participants’ homes. Yet, as highlighted by Coupland already in 2003, “electronically” (i.e. digitally) mediated communication via remotely mediated networks, much like the corpus I have amassed, offers unique avenues for fostering intimacy and social connections, complementing traditional face-to-face interactions (Coupland 2003: 426). This observation illuminates the aspect of this shift, presenting opportunities for interdisciplinary exploration and emphasizing the potential of digital contexts in providing a platform for nuanced spoken interactions. As we navigate this evolving landscape, the fusion of “real life” and digital environments

could significantly contribute to understanding the complexities of spoken human communication.

Dedicating both time and space to document this reflexive process marks a significant step in my academic journey. It sheds light on an essential aspect of my scholarly involvement that often stays concealed. This way, I can show the seemingly linear progression of my research, an illusion that dissipates and gives way to a recognition of the myriad of ups and downs along the way. By incorporating this reflective process into a written narrative, I can, as a researcher, assume a critical stance, offering readers insight into the intricacies of my experiences and positioning my work within a broader academic discourse.

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A constructivist Grounded Theory strategy in applied linguistics research

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Abstract

Der Schwerpunkt meiner Dissertation dreht sich um ein Thema, das mehrere Disziplinen im Bereich der angewandten Linguistik integriert. Die Wahl eines Paradigmas zur Betrachtung des Forschungsproblems sowie einer geeigneten Strategie zur Entwicklung des Forschungsprozesses, waren die schwierigsten Aspekte meiner Forschung. In diesem Beitrag möchte ich meine Erfahrungen mit der Anwendung der Grounded Theory und ihrer Integration mit anderen Datenanalysestrategien im Bereich der angewandten Linguistik darstellen. Folglich wird der methodologische Entscheidungsprozess bei der Auswahl einer konstruktivistischen Grounded Theory Strategie zur Lösung des Forschungsproblems beleuchtet. Darüber hinaus werden die philosophischen Grundlagen der Grounded Theory und die Kernkonzepte, die den Kodierungsprozess leiten, kurz erläutert.

Schlagwörter: Applied linguistics, coding process, Grounded Theory, researcher's position, transdisciplinary research, constructivist grounded theory

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1 Introduction

The topic of my doctoral research is the cultural adaptation of Iranian students in Vienna. The pivotal role of host country language proficiency in facilitating intercultural communications within society and the university environment was one of the most significant reasons my attention was drawn towards researching this issue.

Cultural and societal issues have always piqued my curiosity. This research invited me on a journey to study how applied linguistics intersects with culture and identity on the one hand, and with migration, language policies, and discrimination on the other. It was imperative to consider the interrelated disciplines in my study, which proved to be a valuable experience for me. As a consequence, the door was opened for me to go beyond discipline boundaries and study various aspects of the difficulties faced by Iranian students as they adapted to life in Austria.

I initiated this project with a qualitative approach, collecting data through focus group discussions. Focus groups are a qualitative data collection method, whose primary objective is to concentrate on the research issues in order to achieve a broad spectrum of perspectives from participants through participants' interactive discussion (Hennink 2014: 1–2).

The process of selecting participants for each focus group necessitated a significant amount of time and careful consideration. As the moderator of each group, I asked some questions to encourage participants engage with the topic. The focus groups primarily discussed the challenges experienced by participants in Vienna throughout their academic journey.

Within every group, participants actively engaged in the discussions, exchanging their experiences in various contexts. The friendly atmosphere within the groups created conducive circumstances for exchanging experiences and promoting the expression of varied viewpoints. Consequentially, the focus groups provided valuable and extensive data for my research. Furthermore, I employed individual interviews and short essay writings to achieve theoretical saturation and conduct an in-

depth analysis of the research problem. My Iranian background as well as having a student position in Vienna, provided me the opportunity of being a member of participant groups.

Upon completion of the initial focus group discussion as a pilot study and subsequent data analysis, it became evident that the findings encompassed a wide range of dimensions. Therefore, I needed to use an appropriate strategy beyond the scope of simple latent content analysis and phenomenology to address the analysis of the results. Various practical aspects of language use in the dominant society, including discrimination and resulting inequalities in different dimensions of the lives of these students and the impact of German language proficiency on their educational process and daily communications, constitute parts of the research findings. Therefore, the examination and analysis of data from various perspectives necessitated a strategy that goes beyond content analysis that reaches one holistic concept through phenomenology.¹ Consequently, the research question defined its path within this project, and that was what I was seeking. My goal was to select a strategy that was appropriate for the problem of my research. I had no intention of blindly duplicating an established research framework or merely proving the results of previous studies. Therefore, I embraced the challenges of entering the field of Grounded Theory (GT) research.

In my effort to examine the various challenges experienced by immigrant students, I required a strategy that would enable me to explore and analyze different aspects and dimensions of these challenges. I delved into GT and its different schools of thought to choose an appropriate strategy for identifying various aspects. GT's capacity enabled an analysis of the factors that influence these issues and the consequences that arise from them. Thus, in my thesis, I am currently analyzing and discussing the mentioned issues as well as the existing relationships between the main concepts acquired from data coding.

1 Using the phenomenology strategy, researchers eventually arrive at a fundamental concept. Nevertheless, in GT, there is the potential for the emergence of different fundamental concepts, along with the relationships between them.

During my study, I found that different philosophical roots led to the formation of various schools of thought related to this strategy. Hence, to decide on the appropriate variety of GT for my research, I needed to understand these differences. It was an invitation for me to engage with the underlying philosophical issues.

Given that this strategy was not a common approach in the existing methodologies for research in the field of applied linguistics, I dedicated a substantial amount of time and effort to conducting an extensive search for appropriate sources, reading diverse literature, and learning from it. Hadley (2017) offers a critique of the insufficient consideration given to the potential of GT within the field of applied linguistics, despite its effective use in other sociological domains. He asserts that a significant hindrance to implementing the GT strategy in applied linguistics research is the lack of familiarity with this strategy among professors and students. According to his perspective, the issue contributes to the persistence of existing biases within this domain (Hadley 2017: 4–7). Hence, in this article I will share my experience on how constructivist GT is a good fit for applied linguistics research related to culture, society, and language policy.

The current paper first presents a brief description of GT and its varieties (Section 2). Then, I discuss the main scientific challenge in my research journey, which was the path to reaching the logic of adopting a constructivist GT for my research (Section 3). Following that, I explain the process of gathering data until it reaches saturation (Section 4). Subsequently, I continue with a discussion of the researcher's position in the research process and my coding process based on the selected strategy (Sections 5 and 6, respectively).

2 What is Grounded Theory?

As a qualitative research strategy, GT is based on *symbolic interactionism*,² entailing interpreting data to understand how individuals behave and interact with the “social phenomenon under investigation” (Priya 2016: 50). By analyzing the socially constructed meanings incorporated in the lived experiences of research participants, researchers gain insight into their ideas and comprehend the formation of reality (Milliken & Schreiber 2001: 180).

The GT research process is characterized by its fluidity, interactivity, and open-endedness since researchers maintain an innate connection with their topics. The process entails doing comparative analysis to establish levels of abstraction. The researchers’ involvement with and comprehension of comparisons and emerging findings influence the analytical orientations (Charmaz 2006:178).

In fact, the emergence of GT was a response to the severe criticisms of quantitative scientists regarding qualitative research. In response to the dominance of quantitative research, American sociologists Strauss and Glaser introduced Grounded Theory Method (GTM) through their seminal book titled *The Discovery of Grounded Theory* in 1967 (Charmaz 2006: 4; Glaser & Strauss 1967). Furthermore, they attempted to address the limitations inherent in sociological research by shifting focus away from the mere replication or verification of existing theories, hence creating space for the development of a novel “theory from data systematically” (Glaser & Strauss 1967: 2–3). Therefore, their effort was widely regarded as a revolution in the field of social science research (Bryant 2017: 375; Charmaz & Thornberg 2021).

The fundamental principles of GT encompass the reduction of preconceived ideas about the research problem and data, the simultaneous process of collection and analysis of data, considering their

2 Symbolic interactionism is a theoretical perspective developed from pragmatism, which considers the individuals’ “active and reflective role” in constructing “selves, society, and reality through interactions” (Charmaz 2006: 186).

mutual influence on one another, and the embracing of diverse interpretations of the data (Charmaz 2008b: 155).

Flexibility is a fundamental feature of GT. It requires researchers' openness to various interpretations of the data. Furthermore, by emphasizing flexibility (Charmaz 2006) even in the final stages of the research, GT gives the opportunity to the researcher to review the defined codes, revise them, or change their categorizations. Remaining open to novel issues enables the researchers to modify their direction despite how their projects progress (Neuman 2014: 177). GT enables researchers to develop novel theories by using inductive and abductive reasoning. Incorporating the researcher's intuitive interpretation of empirical facts through abduction might broaden the theoretical scope to unforeseen domains (Charmaz 2008b: 153).

In my project, I aimed to get an extensive understanding of the diverse facets of challenges experienced by students in their cultural and social interactions within Austrian society. I needed to examine participants' experienced challenges from different perspectives. Hence, the adaptability of GT in employing multiple data-gathering methods and subsequent analysis as an advantage enabled an in-depth examination of my subject.

Furthermore, GT afforded me the opportunity to thoroughly analyze the data gathered from interviews, focus group discussions, and short essay writings. This enabled me to explore the problems from various perspectives and examine the influential factors on Iranian students' adaptation in the dominant society. In addition, employing constructivist GT allowed me to consider the socio-cultural and political context in my research.

With further study on GT, I came to understand that epistemological viewpoints play a significant role, which affects how researchers collect data, interact with the data, and engage in subsequent coding and analysis procedures. These epistemological varieties led to the development of different schools of thought within GT, from "objectivist GT

derived from positivism”³ to “constructivist GT as part of the interpretive tradition” (Charmaz 2006: 130). To decide in line with my research topic, it was essential to have an in-depth understanding of the distinctions between these different schools of thought, which required a deep study of the theoretical foundations of GT.

In the following section, I will explain how I ended up choosing constructivist GT.

3 The adoption of constructivist Grounded Theory

The principal figures in the GT schools of thought were Juliet Corbin, Barney Glaser, and Kathy Charmaz. Various philosophical perspectives employed in GT have led to variations in the coding process and the positions of researchers within the investigation. According to Hadley (2017), a thorough comprehension of emerging paradigms and active involvement in foundational philosophical discussions are crucial in the pursuit of alternative methodologies within the field of applied linguistics. To attain a comprehensive understanding, it is important to delve into the foundational notions that underpin a novel trajectory (Hadley 2017: 27–28). Hence, in this section, I briefly discuss the philosophical foundations that led me to decide on my perspective in the research journey.

The underpinnings of positivism, rooted in observation and objectivity, have significantly influenced the development of GT. Meanwhile, the constructivist perspective of Kathy Charmaz, by focusing on abductive reasoning, has been crucial in shaping constructivist GT.

3.1 Glaser & Strauss: The foundations of Grounded Theory

Although several influential paradigms have been introduced in recent decades, Glaser & Strauss’s (1967) initial statement is considered the

3 “The positivist tradition attends to data as real in and of themselves and does not attend to the processes of their production” (Charmaz 2006: 131).

foundation of the entire qualitative revolution because it made qualitative research defensible and respectable during a period when quantitative researchers dominated in framing research (Charmaz 2000, 2006: 6, 2008b).

The founders of GT endeavored to develop precise evaluations for qualitative research. Due to the distinct reasoning employed in qualitative research compared to quantitative research, they argued that qualitative research should be assessed using different criteria compared to quantitative research (Charmaz 2008a: 399). Hence, they established the explicitness of principles and procedures essential to achieving the goal through a systematic method while collecting data and providing explicit strategies for analyzing them (Charmaz & Thornberg 2021; Strauss & Corbin 1990: 409–410). Furthermore, their purpose was to develop a theory by analyzing empirical data.

GT was introduced during an era when established ideas of thorough scientific methodology dominated. Consequently, Corbin and Strauss's statements were developed from a positivist perspective on scientific research (Bryant 2003). Glaser & Strauss (1967) recommend using the extant body of literature in the research area just as a means of providing a broad overview of the study. Therefore, they prevent the researchers from entering the research area solely relying on the existing theory, as it could restrict their perspective during the GT process.

Nevertheless, Glaser and Strauss gradually pursued different intellectual paths and Strauss proceeded to collaborate with Juliet Corbin.

3.2 Strauss & Corbin: A next stage of Grounded Theory

In 1990 Strauss and Corbin jointly published *Basics of Qualitative Research*, a seminal book that established their shared perspectives on GT. Nevertheless, this cooperation terminated the collaborative path between Strauss and Glaser in GT.

The initial method introduced by Strauss and Corbin is based on three stages of coding. The primary coding stage, referred to as “open

coding,” includes examining word-by-word and sentence-by-sentence recorded interviews considering what each data section is about (Hadley 2017: 41). In the secondary stage, they define categorizing related initial codes into groups. In the third stage, called “axial coding,” categories are linked to subcategories, which specifies the properties and dimensions of a category (Corbin & Strauss 1990: 13; Strauss & Corbin 1990) and is used for sorting and organizing substantial volumes of data following the initial open coding phase (Creswell 1998). Adhering to axial coding leads to following a predetermined framework for emerging theories.

The divergences across various schools of thought within the GT process can be attributed, in part, to variations in the approach to reviewing and incorporating existing material during the coding process. According to Strauss and Corbin, engaging in a comprehensive review of relevant literature even before initiating the research process has the potential to increase the researcher’s ability to generate innovative ideas throughout the coding and data analysis phases (Hadley 2017: 40). Generally, I considered traditional GT inappropriate for my research because I did not intend to replicate a predefined framework. Therefore, I proceeded with an investigation into other GT variations.

3.3 Glaser and classic Grounded Theory

In response to Strauss and Corbin’s cooperation in GT, Glaser (1992) published his book *Basics of Grounded Theory* and significantly diverged from their viewpoint. He portrayed himself as the primary hero and proprietor of GT while criticizing Strauss for being detached from GT’s objectives (Bryant 2017: x).

Although he defines initial coding and categorization as the first stage of the coding process, he believes in strict adherence to the data itself, without considering the researcher’s perceived ideas. Furthermore, he does not adhere to the axial coding phase. Instead, to change the path from a predetermined model, and maintain the emerging

nature of GT, he introduced “theoretical codes.”⁴ He defines theoretical codes as, “abstract models that emerge during the sorting and memoing stages of Grounded Theory (GT) analysis. They conceptualize the integration of substantive codes as hypotheses of a theory” (Glaser & Holton 2005: 1).

Theoretical codes exhibit greater flexibility compared to Strauss’s axial codes. According to Glaser & Holton (2005: 1-4), theoretical codes are abstract concepts that are not meaningful without substantial codes. They come from existing theories in the literature. Hence implicitly providing the conceptual framework through which substantive codes interrelate as an interconnected hypothesis to address the primary concern. Consequently, applying theoretical codes requires familiarity with numerous theories in multiple fields. Glaser does not insist on using theoretical codes but argues that, as abstractive models, they assist researchers in comprehending how substantive codes in a study might be related to hypotheses (Glaser & Holton 2005: 13).

When it comes to using existing literature, Glaser emphasizes that the researcher should avoid delving into the literature related to the research topic (Hadley 2017) and believes in postponing the incorporation of existing material until “the generation of the core concepts” (Glaser & Strauss 1967: 37). Glaser’s view on using existing literature has been critiqued by Charmaz (2006), and could be considered paradoxical as Glaser simultaneously proposes the use of theoretical codes derived from the existing literature.

I faced another issue regarding this perspective on keeping the distance of researchers from data and maintaining a neutral role as observers (Charmaz & Thornberg 2021). Additionally, since Glaser’s perspective is grounded in positivism, his theoretical codes are defined without implementing consideration of contextual factors (Charmaz 2006: 127). Glaser, an objectivist grounded theorist, emphasizes avoiding preconceptions, such as the impact of social, historical, and

4 Glaser presents a series of 18 theoretical coding families that include analytic categories such as his “Six Cs: Causes, Contexts, Contingencies, Consequences, Covariances, and Conditions” (Glaser 1978: 74–82).

situational settings on “what is happening in the research” (Charmaz 2017: 39). I decided this strategy was not appropriate for my research. Subsequently, I continued to examine Charmazian constructivist GT.

3.4 Constructivist Grounded Theory

Constructivist GT was introduced by Kathy Charmaz in the year 2000. Based on a constructivist perspective, she focuses on the position of the researcher and the interaction between researcher, participants, and data, and proposes conducting the coding process and developing a theory (Charmaz 2000). Flick (2009: 468) defines constructivism as an epistemology in which the social reality is seen as the result of constructive processes.

Charmaz’s argument in GT emphasizes the distinction between two ideological viewpoints: objectivist and constructivist (Bryant 2003). Charmaz (2008a: 401) criticizes pure objectivism in GT for assuming “single passive reality.” Instead, she advocates for a constructivist approach that embraces the complexities inherent in multiple realities. According to her constructivist perspective, the viewer creates the data and ensuing analysis through interaction with the viewed (Charmaz 2000: 523). Within this framework, the interactive process of research takes center stage, with the researcher’s position and active participation becoming pivotal. Furthermore, applying abductive reasoning fills a gap in previous GT schools of thought. In contrast to Glaser, Charmaz does not advocate for the employment of complex guidelines in the process of theory formation. Instead, she promotes the notion of theorizing as a form of practice. Constructivist GT advocates for engaging with the world and constructing a conceptual understanding of it to define reality (Charmaz 2006: 128–129). In this school, to achieve a comprehensive understanding, it is imperative to consider the social and cultural context around the data and individuals involved.

These points were quite significant in addressing my research problem. Given that my study focuses on intercultural interaction and

related issues in the dominant society, it was crucial to consider the experiences of participants within the social, cultural, and political context. Nevertheless, it was important to consider participants' cultural, social, and political backgrounds also in their country of origin while analyzing and discussing specific issues. Furthermore, interactions between the researchers and participants, along with the data, were an essential factor in developing my study process.

Charmaz's idea that researchers shape the study outputs by their dynamic interaction with data and the research context they bring to the analysis, stands in contrast to the classic notion of a passive and neutral observer (Mills et al. 2006: 9). This perspective underscores the inseparable link between the researcher's influence and the unfolding research narrative.

Charmaz (2006) suggests using "focused coding." Through focused coding, the researcher delves into a detailed examination of key and pivotal concepts in research data, analyzing the dynamics of the relationships among them. However, she does not oppose the use of theoretical codes and considers their use advantageous where it can be helpful. She also considers the beneficial aspects of an initial literature review and researcher reflexivity (Yarwood-Ross & Jack 2015). She is not opposed to using existing literature but emphasizes that it should not overshadow the generating of new ideas by the researcher based on the data (Charmaz 2016).

When it comes to the topic of language in particular, Charmaz & Belgrave (2019: 749) underscore the significance of language and culture in GT research and contend that all data are filtered through the lens of language and meaning. They argue that data inherently carry traces of their historical, material, social, and situational contexts. Furthermore, Charmaz (2017) prioritizes grasping the actions and meanings attributed by participants rather than merely replicating them in a pure objective manner. Therefore, establishing a deep connection, adopting an inquisitive stance towards participants' lives and issues, along with maintaining a degree of distance from the researchers' worldviews during the analysis of transcribed interviews, serve as indispensable tools for researchers seeking a profound level of comprehension within

this strategy (Charmaz 2017). Despite facing criticisms like other GT schools, the constructivist perspective aligned well with my research question, as I needed to consider the social, cultural, and political context in my analysis. Glaser, an objectivist grounded theorist, emphasizes avoiding preconceptions, such as the impact of social, historical, and situational settings on “what is happening in the research” (Charmaz 2017: 39; Glaser 2013). Therefore, applying his perspectives to address my research issues was not useful.

In summary, through a detailed study of various intellectual schools and methods in GT, I realized that all approaches undergo two coding stages. In the first stage, they undergo a meticulous examination of interviews and note-taking. Subsequently, in the second stage, there is word-by-word and line-by-line coding, followed by the categorization of initial codes. Only the Strauss and Corbin model suggests a third, axial coding stage.

Although there is an apparent similarity between these stages, the underlying epistemological perspective behind them is what sets them apart. This epistemological variation leads to different interactions between researchers and data, and researchers and participants. Different ideas between schools are revealed when the researchers confront “tension between emergence and application” (Bryant 2017; Charmaz 2014: 151).

Charmazian Grounded Theory, like other GT schools, faces criticism. For instance, Glaser critiques the constructivist viewpoint regarding discovering concepts, emphasizing the exploratory aspect of GT. However, his clarification regarding the discovery issue in classic GT is unclear. In contrast, constructivist GT develops conceptualization through dialogue between the researcher and the study topic. Furthermore, Charmaz is unbiased towards constructivism and does not view it as the exclusively valid form of GT. However, she considers it appropriate for a comprehensive analysis of constructivist concepts (Bryant 2003).

Through examining various types of GT, I found more proximity between constructivist GT and my research problem. While adhering to the precise process of initial coding and classification, constructivist GT

provides the researcher the flexibility to move beyond establishing a predetermined framework in the path of data analysis. The researcher is allowed to consider the reviewed literature where necessary. Additionally, the researcher engages with the research problem, and how participants construct a reality by conducting a detailed analysis of the data and considering the socio-political, cultural, and contextual conditions.

When it comes to interviewing participants, the flexibility of GT grants the interviewer the autonomy to expand upon ideas that arise on the subject matter being discussed (Charmaz 2006: 29). Hence, during the process of conducting interviews and focus group discussions, when required, I strategically asked questions to elucidate the discussion, thereby facilitating a deeper understanding of the topic.

Moreover, in the process of analyzing the collected data derived from the lived experiences of the participants, I faced issues regarding paradoxes and power dynamics that contribute to discrimination and inequality. As my research is grounded in the field of sociolinguistics, I decided to employ Critical Discourse Analysis alongside the content analysis of GT structures to address linguistic elements that conveyed power dynamics and inequalities in the discourse. I identified some proximities between the philosophical views of these two strategies. These issues include considering the researcher's active role in the research process and engagement with data, reaching across disciplines, following social justice goals (Charmaz 2017: 40), as well as maintaining a critical perspective both in Charmaz's constructivist GT and Critical Discourse Analysis. Furthermore, due to the significance of language in GT, the use of Critical Discourse Analysis proved advantageous in integrating linguistic elements into coding, data analysis, and conveying concepts.

4 Data saturation

Systematically collected and analyzed data are the foundation of GT (Glaser & Strauss 1967: 1). According to the constructivist GT principles

(Charmaz 2008a), the standard for data collection is to reach the theoretical saturation level. The achievement of data saturation in GT does not include the obtaining of recurrent actions and codes in collected data. Instead, it indicates the stage at which the essential characteristics of the fundamental concepts in the research have been fully developed. The point at which theoretical saturation is achieved can be understood as the stage where no further features or aspects of the concepts in the data are discovered (Charmaz 2006: 113).

By allowing researchers to employ various methods to gather data (Charmaz 2006: 10), GT enabled me to integrate focus group discussions, interviews, and short essay writing for gathering data throughout my research project. Consequently, I continued to collect data regarding the challenges that Iranian students experience in their academic life, progressing toward the phase of enriching the categories. Throughout the data gathering process, I remained focused on the primary goal of enriching the underlying concepts through sampling in GT. Therefore, after the initial coding of each focus group discussion and interview, I identified the pertinent issues that necessitated attention to enhance the research concepts. I then considered these issues during the further interviews.

Another challenge I faced in this research was achieving data saturation. I continued collecting data until I reached a stage where the characteristics and properties of the main concepts could be well described. To reach this stage, I arranged four focus group discussions, 22 interviews, short essays, and five interviews with experts. Therefore, I faced a large amount of data to transcribe, translate, and analyze.

The beginning point was a focus group discussion. In executing each focus group, I faced new experiences as well as some challenges, including the time and precision required for the accurate selection of participants for each group, and coordinating the time and location with the participants.

For precise selection of participants in each focus group, I invested extensive efforts prior to its implementation, including establishing communication with Iranian and Austrian students and conducting preliminary discussions to get to know them before inviting them to

participate in group discussions. In addition, I had to consider the delicate issue of ethnic diversity and the university affiliation of Iranian students in Vienna. Hence, achieving precise coordination for every focus group required substantial attention and effort.

Further, I also faced some challenges while conducting the group discussions. For instance, in the first and second groups, despite coordinating the timing and location with the members of the group and getting a final confirmation, I faced two cases of urgent cancellation.

Therefore, in limited time, I had to establish communication with other candidates who met the required criteria to maintain the group arrangement with the appropriate number of participants and ethnic and academic diversity. Managing this crisis in a short amount of time was challenging. One solution that helped me address this issue was approaching more participants than the required number for each group as substitutes.

In general, my inherent interest in communicating with people was one of the factors that made advancing this project, despite all the efforts and challenges involved, a rewarding experience for me.

Ultimately, reaching the data saturation level in my research relied on awareness of the variety of saturation levels in different studies, which are influenced by the nature of the study and the complexity of the topic (Baker & Edwards 2012; Hennink & Kaiser 2022; Morse 1995). Hence, to avoid setting a predetermined sample size, I employed the principles of GT. Following these principles, data collection continued until all key concepts and categories were clearly defined by their properties. In GT, these categories represent the fundamental components of a developing theory. Reaching data saturation indicates the achievement of theoretical saturation in the study suggesting that “no new properties of the category emerge during data collection” (Charmaz 2006: 12).

5 The researcher's position in constructivist Grounded Theory

Throughout the research process, I played various roles in different positions. Each role brought forth its set of challenges and advantages, shaping my journey in profound ways. I enjoyed playing various roles. In this section, I will delve into the role I undertook as a researcher during the data analysis phase.

The continuous engagement with participants and data constituted one of the main reasons for adopting a Grounded Theory structure. Hence, I considered not only the overt substance of the interviews and short essays but also the deep contents, the socio-cultural and political context of the participants, and the contextual factors about the dominant community. During the coding process, I made a conscious effort to thoroughly comprehend the participants and adopt their perspectives to gain a comprehensive understanding of their meaning. In addition, in cases where participants held opinions contrary to my beliefs, I considered them without any bias and attempted to examine the issue from their perspective.

This active involvement became particularly compelling due to my Iranian background and extensive experience living in Iranian society. It afforded me a unique ability to resonate with the experiences shared by participants and interviewees regarding their origin community and the motivations underpinning their educational migration. Furthermore, having experienced student life in Austria, I could better comprehend their experienced challenges in the context of the dominant society. These personal interactions fostered my interest in the data analysis process.

Each of these stages provided me with valuable experiences, even extending beyond the scope of academic research. As a result of my extensive involvement with the subject matter, I gradually discovered that my ideology was changing. By analyzing the actual experiences of the research participants, I gained an in-depth understanding of the underlying sufferings caused by societal discrimination. Consequently, I try to respond to any kind of differences I face in my everyday

existence with heightened comprehension. Furthermore, my inclination toward helping individuals, irrespective of any differences, significantly expanded and my intellectual belief in not belonging to any borders but rather to the unified whole of the universe was reinforced. Therefore, I perceive this experience as an integral component of my philosophical journey and self-development in life.

However, in my research process, the complexity of these interactions lies in maintaining a delicate balance between active involvement and the necessity to keep a certain degree of distance as a researcher.

Hence, I ensured continuous control over my degree of involvement and my subjective standpoint to effectively manage the extent of engagement with the topic and minimize any potential bias throughout all phases of my research.

6 My data analysis journey

Considering the crucial role of data in GT, I endeavored to allocate significant time and effort to collecting and subsequently analyzing data for my research. Coding and categorization processes entail a long journey in GTM. Following the establishment of an analytical framework through the initial coding process to explain larger segments of data, I applied focused coding. In this phase, I categorized the related codes under the most focused code.

According to the GT principles, I followed an “emerging design” by starting the coding process immediately after collecting the initial set of data from the focus group discussion (Creswell 2012: 433). Therefore, I transferred the recorded interviews to my computer and began the transcription process. Additionally, I documented details on all the crucial points I faced during the focus group sessions and interviews to consider them in my coding process and analyses, also writing new ideas. Given that all interviews, except for one group discussion with Austrian students, were conducted in Persian, I translated each of them into English after the transcription.

Since I chose constructivist GT according to my research topic, I was open to new ideas and generating new codes and categories based on my research data. Hence, I did not follow the predetermined axial coding as Corbin and Glaser had defined it, leading to a predetermined framework. Charmaz views GT as a set of “principles and practices rather than prescriptions or packages” (Charmaz 2006: 9). Therefore, she follows a “flexible, open-ended guideline” for GT, following a “crucial coding process,” “writing progressively analytic memos” during data collection and the coding process, “theoretical sampling,” and “theoretical saturation” (Charmaz 2008b: 163). Her flexible principles appeared appropriate for my study.

I initiated the initial coding by carefully listening to the interviews and thoroughly reading the transcriptions and notes. Subsequently, in the open coding stage, I meticulously reviewed the transcriptions word by word and line by line, coding segments containing significant content. In the open coding phase, I attempted to define the codes to reflect the “actions and statements” behind the participants’ statements as “action phrases” (Bryant 2017: 370; Charmaz 2006). I performed this process after completing each of the focus group sessions and interviews.

As I mentioned before, during the process of coding and categorizing data, I considered the social, cultural, and political conditions of the participants and the dominant community. Therefore, I did not adopt a purely objective view of the data.

In general, in the coding process, I engaged in a process of constant comparison, through comparing data to data, codes to codes, and categories to categories. This process helped me to identify relations. Through this process, I maintained flexibility and remained open to unexpected findings within the data. For categorizing the initial codes, I repeatedly reviewed and examined my notes. In practice, the cyclical coding process proved highly beneficial for idea development and clarifying relationships between categories. Although, in my experience, this process is time-consuming and requires considerable patience and effort, I can say that it leads to the discovery of new and intriguing connections. Furthermore, during the coding process, I was writing my

initial analysis and discussion on the coding sections as memos. These memos helped shape the structure of the final analysis and find the relationship between categories.

Under the flexible principles of constructivist GT, which allow the use of existing literature, when necessary, I considered the literature while categorizing codes and defining relationships between them when required. I found this flexibility very useful since, in some cases, I allocated codes closely related to each other into categories, which are abstract concepts covered in the existing literature. Therefore, due to this flexibility, in the categorizing phase, I used both focused codes that arise from emerging ideas during the coding process as well as theoretical codes that align with the appropriate concepts found in existing literature.

While I am mindful at all stages to remain receptive to the emergence of new ideas based on the research data and to avoid limiting my view to the existing literature, I consider controlling this situation another challenging issue in my research journey.

Another aspect I have encountered during the process of data collection and analysis is the broad dimensions of the results. These dimensions engage various disciplines, aligning with the interdisciplinary nature of the research. Widdowson (2005: 12) emphasizes the significance of employing interdisciplinary approaches to address real-world problems. He argues that enhancing the interdisciplinary aspect of applied linguistics leads to a greater capacity to solve problems within the field. Furthermore, examining the lived experiences of participants in various social positions, including Iranian students who deal with the barriers and challenges of adapting to the dominant society in their daily lives, Austrian students who represent the dominant society in the academic environment, and experts involved in these students' issues, enables me to analyze the issues from multiple viewpoints for a thorough analysis. These characteristics along with applying a variety of data collection methods have shifted the nature of my research from

interdisciplinary to transdisciplinary.⁵ In addition, my research includes other transdisciplinary aspects by extending the analysis beyond academic disciplines and bridging the distance between participants' practical experiences as "real-world knowledge" and academic theories as "scientific knowledge" (Filipović 2015: 118).

Currently, I am in the process of reviewing codes and categorizations of interviews and short essays. Therefore, due to the cyclical features of the coding process in GT, there is a likelihood of specific changes during reviewing codes and categories from previous phases. So far, alongside the coding process through analytical memo writing, I have explored various dimensions of challenges, the influential factors contributing to them, and some of their consequences.

During the final phase of this study, once the categorizations have been completed, any relationships among them will be identified. My theory will be determined based on the probable interactions existing among these categories.

7 Conclusion

The expansive scope of applied linguistics research across various domains can also go beyond interdisciplinarity. An example would be to engage different actors and find solutions for language-related issues in various fields, like the teaching and learning context in schools and universities, language policy, and intercultural communication.

In this article, I made a concise reference to the philosophical foundations that have given rise to various versions of GT. The objective of this exercise was to elucidate the underlying justification for my decision to adopt a constructivist GT strategy for my study. Additionally, due to limited research in applied linguistics employing GT, I

5 "Transdisciplinary research is thus by default interdisciplinary, constructivist and complexity-driven, rooted in the presupposition that knowledge includes participation, contextualization, evolution, life-long engagement, transference and adaptation to other fields and problems/issue" (Filipović 2015: 118).

intended to provide an overview of its potential for interdisciplinary and transdisciplinary research in this field.

The flexibility for employing various data collection methods, high precision in data coding, and data analysis procedures, as well as the systematic approach of this strategy, are some properties that show it is appropriate for doing interdisciplinary and transdisciplinary research. Applying GT enables the researcher to make more informed decisions at different levels of the research process, including the procedures for gathering data, evaluating said data, and the formulation and discussion of findings.

As a result, utilizing a data-driven theoretical approach becomes crucial for advancing the knowledge base in this interdisciplinary domain, enabling researchers to delve into uncharted territories and foster innovative theoretical advancements, as well as to provide applicable suggestions and strategies for problems.

Interdisciplinary and transdisciplinary research necessitates analyzing an issue from different dimensions and perspectives, which may lead to the presentation of multiple abstract concepts. Hence, the GT strategy is appropriate for interdisciplinary and transdisciplinary research due to its potential adaptability, data-centered approach, and focus on addressing social problems. Additionally, it enables researchers to define various concepts and propose hypotheses by considering the relationships between them.

Despite the challenges I experienced when conducting GT alongside Critical Discourse Analysis, I found this research experience to be valuable. As I discussed in this paper, the key part this experience involved reading extensively on the different schools of thought in GT to select an appropriate strategy. This process required ongoing study, continuing data collection to reach theoretical saturation, and conducting meticulous reviews. It also included revisiting previous stages for coding validation and categorization.

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Reflexive mobility

How emotions and ideologies of public/private affect the research process

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Abstract

In diesem Beitrag reflektiere ich über die Zusammenhänge von Mobilität, Emotionen, Ideen und Wahrnehmungen im Kontext der öffentlich/privat-Distinktion während meines Feldforschungsaufenthalts in Japan. Dabei präsentiere ich meine Aufzeichnungen in einem Forschungstagebuch als eine reflexive Methode, durch die ich meine eigene Position und die damit verbundenen Annahmen über soziale Beziehungen im Feld kritisch hinterfragen konnte. Während meiner konzeptionellen Auseinandersetzung mit dem Tagebuch wurde mir die Notwendigkeit bewusst, mich stärker auf subjektive Perspektiven in meiner Forschung zu fokussieren. Dies führte dazu, dass ich im Verlauf meines Aufenthalts meine Forschungsmethoden anpassen konnte.

Schlagwörter: Reflexive mobility, emotion, ideology, diary, Japan, fieldwork, public/private

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1 Introduction

In April 2022, I embarked on a one-year fieldwork trip to Tokyo, Japan, to study metapragmatic activity and perceptions of communicative competence in interactions as part of my doctoral research project. My focus was on interactions of L1 and L2 users of Japanese. It was yet another relocation to Japan for study and research purposes, this time specifically with the aim of collecting audio recordings and conducting interviews. The last years have been characterized by a back-and-forth between Germany, Japan, and Austria. While I appreciate the opportunities presented by transnational mobility, I would now like to use this space offered to me to reflect on the significance of mobility in the context of my fieldwork experience. I will give an insight into my reflections post fieldwork in this contribution. The ideas presented here, however, are not an exhaustive review or discussion of the existing literature on fieldwork and its methods per se, but rather a reflection about the research process and how this experience has shaped my choice of methods. I will present a retrospective account of my fieldwork that I enrich with some theoretical concepts and ethical considerations. I will trace back how my position and my emotions have influenced my being in the field, what kind of changes I made based on these reflections during my fieldwork, and how ethnographic and phenomenologically-inspired approaches serve as lenses through which I observe my work.

Originally, I did not design my doctoral research project as an ethnography in the strict sense. My aim was to explore language ideologies in interactions of L1 and L2 users of Japanese who are residing in Japan, by looking at how metapragmatic stances toward competence (i.e., discursive positionings vis-à-vis potential and limitation of language use) emerge in interactional discourse. I did not clearly delineate a field for this project, as it is done in some ethnographies, such as an institution or bounded field site. Instead, I approached various actors via my academic and social network that I established over the past years in several cities in Japan. The original plan was to collect many hours of conversational data and then to

conduct different types of interviews with the participants (mostly with L2 users). These would include, for example, playback interviews in which I would ask about interpretations of communicative practices in the recordings and their experiences of learning and using Japanese. While being in the field, I set foot on pathways that slightly diverged from my initial plan, and I will trace my path in this contribution.

I will start with introducing events preceding fieldwork and a vignette from my fieldwork diary (Section 2). In this diary, I noted down theoretical thoughts, emotions, and experiences while living in Japan. This serves as an introduction to explore conceptual approaches toward understanding the fieldwork experience, starting out with the notion of *reflexive mobility* (Sections 3 & 4). I will then show how the mobile experience is entwined with emotions, specifically feelings of (dis-)belonging that influence how we move within, stay, and leave the field that is characterized by sometimes transient social relationships (Sections 5 & 6). I will outline how I experienced mobility and relations in the field as having a strong impact on what I perceived as a blurring of “public” and “private” contexts (Section 7) and how I reflected on this tension in the diary (Section 8). Lastly, I attempt to contextualize the status of the diary as an example of a fractally recurring distinction pertaining to a resignified public/private opposition within the whole research process that extends beyond the fieldwork phase (Section 9). I also touch on ethical issues related to this distinction. I conclude with the implications I drew from this experience for adjusting my research methods (Section 10).

2 Introducing events and pathways

The whole doctoral project started with a disruption. I moved to Vienna in March 2020, less than two weeks before the Austrian government issued the first lockdown, meaning that social contacts and social life had to be reduced to a minimum in order to diminish the spread of the Covid-19 virus. Japan had reacted to the pandemic situation by banning new entries to the country and decided not to issue any new visas. I

originally scheduled the fieldwork phase for the second year of my doctoral program. The trip had to be postponed several times and I had to wait one year to be able to enter the country. The restrictions were gradually lifted in 2022 and I received the notification of the host university to be able to enter the country in February that year. I had less than two months to prepare for leaving Vienna in order to arrive by the start of the new Japanese semester in April. It was an ambivalent situation for me. I had just settled in a new shared apartment in Vienna, and in the next moment, I found myself in a haste to prepare to move to Tokyo and start fieldwork. At the same time, I was glad to finally be able to go back and reconnect with my social network there. After settling down in Tokyo, I started my research and journaling. The following extract from an entry describes a scene and thoughts that I noted down after over four months into fieldwork.¹

Extract from one entry of the fieldwork diary

17.08.2022 Mittwoch Abend/Nacht

After the interview with [], I went to an Izakaya with Naoya and Anna. 3 年ぶりだったからすごく話が盛り上がった。Es war echt schön mit den beiden zu sprechen. Annas Japanisch ist auch extrem gut. Ich glaube es war vor 3 Jahren auch schon gut, aber nun, dass sie in einer japanischen Firma arbeitet, ist sie noch mehr ... fluent? Zumindest soweit ich das beurteilen kann. Competence is related to fluency.

Ethnographic questions, mobility, feelings

Ich merke immer wieder, dass sich Privates und Arbeit immer weiter (?) / wieder verschmelzen. Ich fange an, Freunde zu erforschen. Per se ist daran ja nichts schlechtes. Interaktional-soziolinguistische Forschung arbeitet ja durchaus öfters mit Freunden (s. Tannen, Sierra). Allerdings ist es dann auch so, dass ich irgendwie arbeite, wenn ich mit

¹ I have kept the syntactic and stylistic idiosyncrasies of this text fragment. All names are pseudonyms.

Freunden unterwegs bin. Das liegt allerdings auch ein bisschen an meiner Forschungsfrage oder meinen Forschungsinteresse. Was mich ja ursprünglich interessiert ist die Spontaneität von metapragmatischer Aktivität. „Plötzliches“, situatives, dekontextualisiertes (?)

Charakterisieren von sprachlichen Praktiken. Und die sind eben so gewöhnlich, dass es mir dann auffällt, wenn ich mit Freunden unterwegs bin.

Allerdings bleibt dabei immer ein Unbehagen zurück, weil ich ethisch immer ausloten muss, wie viel ich nun studiere / observiere und wie viel ich einfach nur auf der freundschaftlichen Ebene gegenwärtig bin.

Translation of the entry from the fieldwork diary

17.08.2022 Wednesday evening/night

After the interview with [], I went to an izakaya with Naoya and Anna. It's been three years, so our talk was so exciting. It was really nice to talk to them. Anna's Japanese is also extremely good. I think it was already good three years ago, but now that she is working in a Japanese company, she is even more ... fluent? As long as I can assess it. Competence is related to fluency.

Ethnographic questions, mobility, feelings

I notice again and again that private and work are further (?) / again merging. I start to do research on friends. It's not something negative per se. Interactional sociolinguistics often works with friends (see Tannen, Sierra). But it is also somehow like I'm working when I'm out with friends. This is also kind of because of my research questions or research interest. What I'm originally interested in is the spontaneity of metapragmatic activity. "Sudden," situated, decontextualized (?) characterizations of linguistic practices. And it is so common that I notice it when I'm out with friends.

However, there remains some discontent, because I always have to balance the ethical boundaries as to what extend I'm studying / observing and to what extend I'm just present as a friend.

This is the first instance in the diary in which I mention a merging of “private” and “work,” because in the first paragraph of the entry, I was thinking about Anna’s competence in Japanese in a setting which was not fieldwork for me, but leisure time (after conducting an interview with someone else for my research on that day). The next paragraph contextualizes this thought with reference to two researchers in interactional sociolinguistics and the nature of the research topic I chose. I regard the last paragraph as especially relevant for the ensuing reflection. I describe that these thoughts left me with a feeling of discontent and pondering over ethical issues that frame how I view my relations with friends and interlocutors in the field. It appears that I do not want to do research with or on friends. This might be an abstract attempt to keep interactions with friends (private) and interactions in work-related contexts such as interviews (public) separate. In subsequent entries in this diary, I labeled this distinction as *public/private*. The merging of these two spheres and how it affects the research process and my methods continuously surfaces in this diary.

The conditions that structure the interaction at the izakaya are contingent on *mobility*—me moving back to Japan to reconnect with Naoya and Anna, both of whom I met in 2017 when I was studying in Tokyo. During fieldwork, I repeatedly thought about the conditions and effects of mobility and the act of moving or relocation, in particular. I exercised what might be called *reflexive mobility*.

3 Reflexive mobility

When reflecting on mobility in my research context, I think of a rather privileged form of mobility that can be defined as the (in)ability to move across spaces physically. This concept originated in mobility and transportation studies. Cairns (2017: 415) defines reflexive mobility as social actors’ reflection on their moving choices and “that choice [is] contingent upon societal response; for instance, receiving approval from one’s peers, colleagues and, in particular, superiors.” He claims that

the better the societal response to moving choices is, the more successful is the sojourner's overall moving experience. I find this view on mobility, reflexivity, and individuals' choices a bit too simplistic. Reflecting on mobility, I would argue, is not only about reflecting about one's mobility choices and entirely contingent on societal response, but a deeper personal or subjective engagement with the emotions, experiences, and broader social conditions that surround and frame the process of moving. I want to accentuate the bodily and emotional dimension of this process. Reflexive mobility may also go beyond the subjective and extend to reflections of mobility in the context of societal constraints and structuring forces that may influence a subject's (in)ability to physically move and intermittently settle across different spaces. Reflexive mobility is here understood as a person's reflection and interpretation of moving bodies and moving practices. Therefore, I do not discuss reflections on social upward mobility in terms of improving one's socioeconomic status here.²

Mobility, we see, is movement or motion, not only physical, but also emotional. In the Japanese context, mobility is extensively investigated with reference to migrants' sense of belonging to Japan (Liu-Farrer 2020), or migration of Japanese nationals to other parts of the world, such as Europe (Klien 2020). These studies indicate that, boiled down to simple terms, individuals move to pursue a better life. The focus of this strand of research is, however, on mid- to long-term migrants and permanent residents. The researcher's sense of belonging during temporary moving periods (e.g., to Japan when they are not residing there or abroad) has hitherto not been considered in discussions about mobility. Recently, (auto-)ethnographic studies on mobile individuals' experiences of using language are emerging in the field of (Japanese) applied linguistics (Kawakami et al. 2022; Miyake & Arai 2021). These researchers call for incorporating subjective and self-reflexive perspectives to understand the emotional processes and practices that

2 For a discussion on reflexivity and social mobility, see, e.g., Archer (2007). See also Urry (2007) for a comprehensive discussion on the impact of movement on individuals' lives.

individuals on the move engage in. These are people the researcher encounters in the field as well as researchers themselves. They emphasize the necessity to allow space for researchers to explore their own trajectories of mobile selfhood that formed their identities and influenced their research practices. Miyake & Arai (2021), for example, include columns in their edited volume where the contributors who are studying mobile individuals have space to briefly discuss their own mobile trajectories and how they became interested in language and mobility. Following their approach, I explore my own reflections on mobility. In the next section, I touch on general aspects pertaining to moving in academia, before I report on my own fieldwork and the conceptual tools that contextualize how I made sense of the overall experience.

4 Moving researchers

I am certainly not the only researcher reflecting on personal mobility and how moving impacts one's life. Researchers move for various reasons. In the contemporary neoliberal university environment, where employment is characterized by rather short fixed-term positions, they may move to work at a different institution; doctoral students may move to enroll at a specific institution that offers a program in their specialization or to work with a specific supervisor. Moving for work always has a profound impact on one's private sphere. Fieldwork in a country other than one's affiliated institution or place of residence is another reason for moving and is framed by specific institutional regulations and conditions, such as the length of the stay, funding, etc. Moving to a place "far away" was arguably the dominant mode of Western ethnographic enquiry for a long time. The specific act of moving (and reflecting on it) is sometimes discussed in sociolinguistics and linguistic anthropology, but not so much in Japanese studies, particularly in the European context.

Various researchers have reflected on their fieldwork experiences in Japan and addressed, among other aspects, codes of ethics (e.g.,

Robertson 2009), anthropologists' experiences and lessons they accumulated in the field (e.g., Bestor et al. 2003), and practical guidelines for young scholars who plan to do fieldwork (e.g., Kottmann & Reiher 2020). However, they do not discuss the researcher's reflection on emotions and broader societal conditions of moving. Alexy & Cook (2019) present a chapter on how the contributors in their edited volume designed their ethnographies building on intimate relationships in contemporary Japan, but they do not address moving to or from the field site. It appears that there are ample descriptions of how (Western) researchers move *in* Japan and how they make sense of their encounters and obstacles, but discussions on access and moving to the field site are missing from the overall picture. I will shed light on this aspect in the next section, where I address how moments of disruption could be turned into a resource.

5 Before fieldwork

Moving to Japan was, as described when introducing the events, impeded by governmental entry restrictions. Not knowing when I could prepare to enter the country left me with uncertainty. As the situation was constantly changing, it was impossible to plan ahead for the next months. Of course, this situation of uncertainty has affected not only me, but many researchers who work at institutions outside Japan. It had a particularly detrimental effect to the wellbeing of PhD students working on Japan-related topics that require to do fieldwork in the country (Sasaki 2022: 4). They were caught in a limbo, not knowing if and when they could carry out their fieldwork projects. In other words, this situation can be framed as a matter of denied institutional access to the field site.

While denied access evidently obstructs research projects, moments of struggle and disruption can sometimes be turned into a resource for ethnographies (e.g., Hassemer & Flubacher 2020). I now understand this in retrospect, as I have realized that my fieldwork started some time before I could actually move to what I designated as the field. It started

when I was still in Vienna, in the preparatory phase, but during a time when the prospects of obtaining a visa for Japan and moving there were quite grim. Not being able to enter Japan has made me reconsider my original research design. I shifted “the field” from Japan to my social network in Vienna and asked friends if they would be interested in sharing some of their interactional routines with L1 speakers of Japanese with me. Later, I understood that if I want to study people on the move, it appears as evident to look for them not only in one country, but at multiple sites (Marcus 1995). This claim has also been made in ethnographies in the field of Japanese studies (e.g., Klien 2020: 203).

One day in spring 2021 in Vienna, I was talking about the challenges I was facing with my fieldwork with some friends. I expressed my frustration about the overall situation and felt a bit hopeless about the future of my project. One of my friends was in a similar situation. At that time, she was planning to move to Japan to live together with her Japanese fiancé, but had difficulties obtaining a visa. She offered me to participate in my project by recording her weekly online interactions in Japanese with her partner. Although I was grateful that she offered me to participate, initially I was reluctant to deviate from my original plan to collect data only in Japan and not to include friends of mine. At that point I was already fearing that the private time I was spending with them could stand in conflict with my professional time (in public) as a researcher who is supposed to collect linguistic data according to robust methods. However, in retrospect, I think this was the first step toward an ethnographic experience, the starting point of a line of thinking about methods in general, questioning how I approach the field. This experience also made me think about how to establish contact in times of immobility, and what the relation between my private free time and public professional time could be.

So far, I have addressed emotions of a rather negative sort, such as discontent, uncertainty, frustration, and hopelessness, which were evoked by social circumstances out of my control and had a severe impact on the preparatory phase of my fieldwork. Having overcome the uncertainties that characterized this phase, I entered Japan in April 2022 and I therefore now turn to my experiences during fieldwork.

6 Belonging and position during fieldwork

Belonging and feelings of attachment are one type of emotion that informs mobile individuals' experiences. How I make sense of feelings of belonging is something I was repeatedly confronted with during my fieldwork as well and I have several entries that are labeled "belonging" in my diary. How do I think about my relationship to the country (*place-belongingness*), and how do I feel about my status as a researcher? It was an ambivalent situation. I was someone coming back to Tokyo who used to live there as a resident for some time as a fully-enrolled MA student. Now coming back for a delimited period,³ I found myself in a conflicted position. I tried to balance the professional part as someone receiving money from a Japanese academic institution to conduct research for one year with my personal self, someone who comes back to a place that is filled with memories. I naturally wanted to reconnect with the many people who stayed after I left in 2019 upon completing my program. In a sense, I occupied the same position as an exchange student, who typically spends one year in Japan, but also a totally different position, with a clear academic work-related plan of what to do during my time there. What is more, I felt that I was older than most exchange students, and that I probably had more prior experiences living in the country.

My liminal status was also mirrored by interlocutors. I was often asked if I was working or studying in Japan; if I was an exchange student or a working person ("does doctoral research count as work?"); why I was affiliated with institutions in Austria and Japan at the same time; why I was staying for one year, etc. While these were reasonable questions to ask a foreign researcher, I also perceived them as somewhat alienating me from friends, fellow researchers, and other interlocutors.

Having explored feelings of belonging as one spatial dimension of mobility, I now turn to a more temporal experience of mobility. While engaging in mobile practices is connected to places, mobility also

3 My time during my MA was not limited, as I initially left the question open of whether to leave Japan or stay upon completing my program.

indexes temporariness, or *transience* of social configurations and encounters. Lønsmann et al. (2017: 265) underline that the concept of transience “foreground[s] the *temporality* of norm formation, located within the practices between people *on the move*, somewhere along a timeline that has a beginning and an end” (emphasis in original). In transient configurations, people come together, engage in various practices, and go separate ways. Although many ethnographies illustrate that fieldwork relations can be enduring, spanning over (virtual) spaces and years, I experienced moments in which I felt this transience, the fleetingness of some encounters, during my fieldwork as well. Practices that were established during my collaboration with individuals in the field emerged, were maintained over some time, and then sometimes partially suspended when I left Japan. Transience had also an influence on my emotions. Being aware that my time for on-site fieldwork would be limited to one year (and I could tell from my other stays that one year is not as long as one might assume), I felt pressure and anxiety, oriented towards my research and social relations. Would I collect enough data to write a dissertation? Can I live up to the standards of academic fieldwork? Could I “immerse” myself enough into the Japanese society? Could I establish a network with other academics?—a proleptic thought aimed at structuring my future career as an aspiring researcher. Financial and institutional constraints also shape transnational projects. In my case, I knew from the start that it would be impossible to extend my fellowship. And the pandemic entry restrictions that the Japanese government enforced over approximately two years left me with the impression that it would be extremely difficult to come to Japan again, in case I would need to suspend my fieldwork for some reason or if I were to come back later. All these thoughts recur in reflections on mobility and its constraints.

Some fieldworkers claim that emotions cannot be separated from methods and that science in general cannot be separated from emotional dispositions that the people engaging in science hold (Davies 2010; Devereux 1967). I gradually came to realize that emotions are also interwoven with the ideologies we hold toward specific research procedures, or how social relations in the field are structured. Lo Bosco

(2021: 15), for example, describes how “feelings of doubt, uncertainty, hesitation and vulnerability” have shaped her analysis of ethnographic data. For me, these emotions were oriented toward broader societal conditions that impacted my mobility before moving, as described above, but they were also oriented toward social relations and a perceived blurring of what I constructed as distinct spheres of public/private during fieldwork.

7 Public/private and field relations

When I first tried to conceptually approach what I labeled in my diary as “public” and “private,” I took into consideration that my understanding of public/private might differ from definitions we find in sociological literature.⁴ I equaled “private” to free, leisure time with friends, and “public” to work-related time and social relations (interviews, for example), as already labeled in the extract from the diary. The labeling of scenes and interactions as private or public is often done retrospectively (Gal 2005: 29); therefore, reflecting on my usage these labels in writing, I now understand them as a resignification of an *ideological* distinction. That is a reinterpretation or reconfiguration of meaning I attributed to what I experienced as recurring, salient scenes and encounters during the fieldwork period that, in my view, should be differentiated. I regard public/private as my “folk terminology.” This ideology may be influenced by a Western idea of a public/private distinction that characterizes these as distinct social spaces (Gal 2005). A perceived collapse through mutual infiltration of these spaces made me slightly uncomfortable in the early stage of the fieldwork, when I sensed that I applied a professional gaze in a non-professional context. As an ideology, the public/private opposition is a partial view and constructed compartmentalization of social events, experiences, and

4 For example, “the public” is often discursively constructed as a counter-arena to the field of linguistics as an academic discipline (Spitzmüller 2019). Without consulting much literature on this topic, I intuitively placed academic work into the public realm and labeled diary entries accordingly.

relations that I classified as belonging to either public or private social realms. My conception of this distinction is then more precisely called a *language ideology* (Gal 2005; Irvine & Gal 2000), a partial view on language use and my research on language use that is projected onto ideas of how communication in social events and social relations might be differentiated. This opposition is therefore associated with forms of communication and contact (Gal 2005: 25). While being aware that these two spheres constitute extremes on a continuum, a blurring of this conjectured distinction evoked a feeling of discontent, as I initially outlined.

How did this ideological resignification come into being for me? My conviction that I should keep these realms separate might be informed by sociological literature on research design that stipulates procedures and justifications for participant selection. Too much personal or private engagement with research participants may be seen as having a potential influence on my interpretation of the data. From an ethnographic perspective, however, thinking about the different degrees and nuances of building rapport is at the center of methodological reflection.⁵ In order to assure myself that research counts as “proper work,” I thought that it would be necessary to divide social relations and spaces into two distinct spheres. I was then confronted with the question of whether I can “use” friends to help me with my research, or whether I should “leave” them in the private realm.

Another anchor point on which the public/private distinction operates is moving. Balancing work, my professional self—a researcher who came to Japan to collect data, or a *professional stranger* in ethnographic terms (Agar 1996), a self that I wanted to present to my interactants—was confronted with a natural wish to reconnect with friends, make new friendships, and enjoy my private life there.

5 While in ethnographies on Japan, ethnographers’ relations with interlocutors in the field are described as degrees of *intimacy* (in a broad sense) or *closeness* (e.g., Alexy & Cook 2019), linguistic anthropologists have conceptualized social relations in fieldwork as *rapport* (Goebel 2019, 2021), or the conflicting nature of contact as *discordance* (Takekuro 2018).

Gradually, personal relationships merged into participations to my research project. At the same time, I had the feeling that I wanted to keep my work-related relationships apart from my personal relationships. This led to a feeling of discontent that I described in the extract from my diary. I was asking myself if want to let go of these chances to collect data. There are two reasons why this tension arose. First, as outlined in the introduction, the field was less demarcated than in other ethnographies. I was surrounded by it all the time and perhaps the most interesting insights came from interactions with people during a time that I did not consider research time or fieldwork in the strict sense. Nevertheless, these interactions caught my interest and I noted them down in my diary. They left a trace. Second, the phenomena I was interested in where so broad (initially perhaps too broad) that I encountered them in unexpected places. People address issues of communicative competence in various circumstances. I anticipated this, but saw myself confronted with assessing the relationship between research time and private time. Keeping a diary was then the best way to note down my insights from what I perceived as two arenas in one document, trying to represent them in the same way.

8 The diary

Initially, this diary was not intended to become so relevant. Through writing, however, I understood that this text visualized or materialized my growing assumption that I could not and did not need to keep public/private apart. This distinction also collapsed with and within the text. A short explanation on the contents and extent of the diary is in order here. Mostly, this diary does not comprise real-time notetaking of observations I made, but rather post-reflections, entextualized reflections on situations I experienced during my research time and my private time (and in-between), usually written on the same day, or one to two days later. I recorded daily activities, people I met, places I visited, and my research activities and progress. Some entries are only a few sentences long, others extend over several pages. Sometimes I made ad

hoc audio recordings to capture my thoughts as well. I started to note down insights concerning my research and reflections on interviews upon entering Japan, but moved to more systematic day-by-day journaling in August 2022.

This diary gradually merged with a conventional diary that I am keeping for ten years now. In that diary, I note down activities and emotions per day and sometimes more complex reflections on some periods in my life, such as reflections on a passing year. In some entries of the fieldwork diary, I develop or sketch theoretical ideas, something I was doing in written form in a separate notebook since I started the doctoral project. I now understand this diary as a condensed form of a biographical record that I formed over the year into a text(-artifact) that “may be recontextualized in future contexts of reading” (Nozawa 2007: 157). This works via anticipation or imagination of these future contexts and potential broadening of the participation framework. For instance, some segments may be disclosed to an audience, such as the participants in the workshop in which a first draft of this text was discussed, or the readers of this published article. The “diachronic flavor” of this text is thus shaped by presupposition and creation of these contexts on various scales (Nozawa 2007).

9 Nestings, recursions, and ethics

The perceived discomfort experienced by blurring boundaries of public/private before and during fieldwork was captured in the diary. At the same time, the diary for me was, for most of the time, a rather private text in which sometimes public issues were reflected upon. Thinking about its status after fieldwork, I think that it illustrates *nested* indexical relationships between the resignified public/private nexus, social relations, and texts. Social relations in the field point to my imagined public/private nexus. The diary discusses this relationship but at the same time also points back to this nexus when private experiences and thoughts on my research merge within the text, and when I use parts of its content and transport it into the public, such as discussing it at the

workshop and writing an article about it. These relations are embedded at different scales that frame the research process, and can be described as *fractal recursions* (Gal 2005; Irvine & Gal 2000). Fractal recursion is a semiotic process in which an interdiscursive chain of opposition or distinction emerges on different axes. It starts from reinterpreting *work vs. leisure* as *public vs. private*. These distinctions index my engagement with various interlocutors and my organization of resources and activities that are associated via ideologies. For example, one axis relates to communication technology. At one point during the fieldwork period, I realized that the messaging app I was using to chat with my friends in Japan was the same app I used to contact potential research participants. The distinction work/leisure was surfacing here again, pointing to, or being nested, within my internal public/private resignification.

Another axis surfaces within the contents of the diary, as outlined above. In other words, the public/private distinction is transported into, and hence projected onto, this text artifact. This artifact is my reflection and a metapragmatic discourse on communication in and out of the field. The distinction is projected onto yet another axis when producing a manuscript for the workshop in which these issues were discussed, and when I later formed the manuscript into this article. In the writing process, I reflect on how much from my privately recorded thoughts that came up during fieldwork can be shared with others, such as readers of this publicly accessible published text. A diary is usually a text-artifact not shared with an audience.⁶ This understanding of a diary stands in contrast to the paragraphs in which I develop theoretical and method(ological) ideas and reflections on my interviews, which I regarded as potential texts to be shared (perhaps even as a vignette) with an audience, e.g., readers of the dissertation or publications that circulate among scholars.

6 Notwithstanding that there is certainly also a literary genre of published diaries, sharing a diary that was written during fieldwork can reveal the researcher's somewhat disturbing stances that may not be intended to be circulated among others (see Malinowski 1967 as an example).

However, ethical issues, especially issues of consent, also have to be considered on yet another axis. I accumulated various insights while living in Tokyo, not only while being in the field or rather “on the job.” Throughout the day, I noted down observations I had during social encounters in my diary. Now, upon returning and reflecting on this data, I am still unsure how and if I can use these insights. Of course, some people that are mentioned in this diary did not give their consent to be observed (although in the vignette from the diary, I do not consider what I noticed as observation) or publicly mentioned in a research piece like this. Gaining consent afterwards is also subject to discussion. Even for those recordings I explicitly gained consent for, ethical questions remain. For example, segments of private talk that was recorded for me are transported into the realm of the public as transcripts embedded in texts. Are my participants fully aware of the implications of this academic life of texts? Texts come into being through processes of *entextualization* (becoming a text) and undergo *contextualization* (embedding of text in a social world), where data flows within the text through the world, as they may be iterated (*cited*) and therefore *recontextualized* in other publications (Bauman & Briggs 1990). They develop their own dynamics that may be hard to capture. Because not only texts, but snippets of lives are shared to an audience. What is more, while unacquainted people may not be able to identify the participants I mention in texts, common friends may indeed be able to do so. How would they react? What we can see here is another fractal recursion in which the public/private nexus is nested in recurring ethical considerations. I experienced a form of interdependence of social relations that is inherent in the *precariousness* of fieldwork, but also has the potential to be transformed into a resource to understand the overall experience (Hassmer & Flubacher 2020). The public/private distinction therefore also concerns ethical questions of data collection, thus extending way beyond the spatiotemporal field.

10 How methods evolved

Lastly, I want to address how my reflections during fieldwork described above have helped to modify my methods and rethink my work after coming back. For example, (self-)reflexivity has helped me to understand how my research interest of discourse and competence in the context of Japan and Japanese can be applied to myself. The phenomena I am interested in are phenomena that I immediately experienced through my subject position as an L2 user of Japanese. I was aware of this position before going to Japan, but it became more salient after conducting research there. For example, when I ask participants about their perceptions of belonging, how they feel about being in Japan and using Japanese, I noticed in writing that I (recursively) directed the same question to myself. What makes me study about Japan and Japanese and keep coming back to the country? The same can be said about communicative competence in Japanese. I tried to find out how my interlocutors construct and perceive it, but I had to ask myself how I perceive my competence. Some entries clearly show that I had doubts about, for example, my abilities to conduct interviews in Japanese—my *meta-communicative* competence in interviewing (Briggs 1986)—and how my competence is perceived by others. I feared that others would implicitly question my competence to conduct research on and in Japanese as a so-called non-native speaker, who is only temporarily affiliated with a Japanese institution and based in Europe. To understand experiences, emotions, tensions, and the messiness of fieldwork, I turned to diligently noting down my thoughts.

I now regard this diary as a method in itself and a reflection on methods at the same time. It is a tool for understanding, a way to interpret what is going on while doing research. For example, after every interview and encounter with potential research participants, I wrote down my impressions of the scene, reflecting on the situation and on myself. I also coded paragraphs in the diary with subheadings and this helped me to identify recurrent topics, not only related to my research questions, but to how I perceived my being and position Japan. I gradually became aware that a more subjective view on experiences

may be more promising to capture how metapragmatic discourse on competence unfolds. Through the diary, I could take on a first-person perspective that is in accordance with subjective perspectives on language use in applied linguistics, emphasizing the “I” at the center of interactional experiences (Busch 2013: 13–79). If I experience tensions and reflect on these experiences and tensions, so do my participants, I assumed. I started to work more systematically with this diary and integrated the insights I gained from writing into my methods. I realized that using language and reflecting on one’s competence in language(s) is an emotional and subjective experience that is mediated through perceptions of self and others (see, e.g., Merleau-Ponty 2012 [1945]).

This insight made it necessary to shift toward a *repertoire* approach, inspired by phenomenology (Busch 2012). I readjusted my focus to investigate explicit metapragmatic activity that emerges in L2 users’ narratives about using different resources, not only Japanese, because I understood that Japanese is one resource among others for my mobile interlocutors. I asked my participants to draw language portraits (see, e.g., Busch 2013) for me and on the basis of these portraits, I could explore their perceptions of their linguistic repertoire, competences, and how these were shaped by past interactions. In these narrative interviews, my interlocutors offered emotional depictions of belonging and their being in Japan, as well as tensions they experienced in their negotiation of competence while using Japanese in private and public contexts. Here, I could discover that the issues related by my interlocutors share many similarities with my own experiences in the research process.

Finally, I could also explore my own and my interlocutors’ (reflexive) mobility and moving trajectories through this subjective approach, as mobility is experienced primarily through the body, in physical as well as emotional movement. I think that particularly sharpening the ethnographic dimension of my project has helped me to apply a reflexive lens and to reconsider the methodological foundation of my research.

11 Conclusion

The ideas I presented in this contribution are probably something that many doctoral students doing fieldwork dwell on, but spaces to engage in discussion on its implications on the research process are limited in academic publishing. One reason might be that for many scholars, the private is not supposed to be part of academic rigor. But it seems that we can at least embrace these ideas in anthropological and applied linguistic research that questions such a veiling of the researcher's own position. Therefore, I tried to illuminate in this contribution how my reflections on conditions of mobility in fieldwork are helpful to make sense of the lived research process. I used concepts that I conventionally employ when analyzing my data to analyze my own experience. Through writing, I understood that my emotions that respond to interactions with individuals during my research in Japan are shaped by the conditions of moving to, within, and away from the field. Emotions are interwoven with ideologies that I hold about how I structure my time, space, relations, and encounters with others.

A recurring question was how and if I can keep work and private life separate. Such resignified ideologies of public/private are informed by my ideas of what an ideal research design for a doctoral project should look like, as academic projects are framed by specific generic requirements and expectations. Through fractal recursion, this distinction is projected onto different axes, such as the diary and this article.

Finally, I explained that turning toward journaling and reflecting on my diary, an entextualized subjective representation of experience, facilitated my considerations concerning what kind of adjustments to my methods could be made during the fieldwork period. This led to a deeper engagement with a repertoire approach toward language, i.e., language portraits and narrated experiences of communication, thus opening up the possibility of exploring subjective perspectives: my own and those of my interlocutors.

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Finding interviewees in digital ethnographies of social media communication

Choosing a channel for approaching

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Abstract

In diesem Beitrag reflektiere ich über das Thema, wie man in der ethnographischen Forschung von Social-Media-Kommunikation einen »channel for approaching« (CfA) auswählt, d.h. ein Medium, über das mit potentiellen Interviewpartner:innen Kontakt aufgenommen wird. Zuerst wird behandelt, wie CfAs in früheren Facebook-Ethnographien adoptiert wurden, bevor die Herausforderungen meines Projekts – auch einer Facebook-Ethnographie – reflexiv und kritisch diskutiert werden. Dazu wird auch eine Pilot-Studie präsentiert, wo Nutzer:innen via Facebook Messenger kontaktiert wurden. Alles in allem argumentiere ich, dass bei der Wahl eines CfAs Medienideologien (der Nutzer:innen sowie der Forschenden) und die Affordanzen des Mediums zu berücksichtigen sind.

Schlagwörter: Ethnography, interviewee recruitment, reflexivity, media ideologies, social media, Facebook

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1 Introduction: Establishing (digital) contact

Communicating with research participants is paramount to ethnographers, wherever they may be conducting their research. Recent decades have seen the emergence of ethnographic fieldwork based not only in physical field sites but also online. These digitally-gearred approaches, varied in scope and methods, have been introduced under various names, including “virtual ethnography” (Hine 2000), “netnography” (Kozinets 2019), and “digital ethnography” (Varis 2016). Adopting the latter term here, in digital ethnographies the necessity typically arises of communicating with participants chiefly if not exclusively through digital channels. This may range from establishing initial contact with users to conducting full-fledged interviews in digital environments. This paper provides a reflection connecting these two points, focusing on how to go about digitally establishing contact with users when seeking to conduct online interviews with them.

The conduction of qualitative interviews online has been a topic of scholarly debate since the earlier days of the internet (see, e.g., Chen & Hinton 1999; Crichton & Kinash 2003; Mann & Stewart 2000). Issues of interest have included the optimal selection of an interview medium, whether it be a particular platform like Skype (AlKhateeb 2018; Seitz 2016) or Instagram (Hugentobler 2022), a more general preference for a-, semi- or synchronous communication channels (e.g., Clarke 2000; Kazmer & Xie 2008), or a consideration of the modalities of the conversation (audio, video, writing; e.g., Oates et al. 2022; Salmons 2012).

What these issues amount to is processes of decision-making regarding the use of media in one’s research. As such, these are matters decidedly shaped by *media ideologies* (Gershon 2010); i.e., our varied stances and belief patterns surrounding the appropriate use of media in communication. Ideological judgements about the usability of media and the moral connotations of their use are of particular relevance to digital ethnographies. A key reason for this is that researchers and research participants today tend to have access to and habitually use multiple communication channels in their day-to-day lives. This idea is

captured by the notion of *polymedia* (Madianou & Miller 2013). Madianou & Miller (2013: 170) define polymedia as “an emerging environment of communicative opportunities that functions as an ‘integrated structure’ within which each individual medium is defined in relational terms in the context of all other media.” This approach thereby puts “emphasis upon the social and emotional consequences of choosing between those different media” (ibid.). These “social and emotional consequences” are especially salient in digital ethnographic practice as researchers attempt to establish contact with potential informants in mediated environments.

Adopting this framing, in this paper I want to provide a reflexive account of my own media-related research practices for interviewee recruitment in my doctoral project. Specifically, I want focus on the choice *not* of the medium through which to conduct interviews, but of *the digital communication channel through which to establish first contact with potential interviewees*. Despite existing discussions of interview media and their pros and cons, the choice of this channel, which I will call the *channel for approaching* (CfA), is given little attention in published qualitative research on social media. Mostly, a brief note on how interviewees were contacted appears in papers’ “Methods” sections (e.g., Farquhar 2012), most pronouncedly in studies on sensitive subjects (e.g., Demant et al. 2019), which also invite dedicated reflections on the topic of contacting interviewees more broadly (see Lavorgna & Sugiura 2022). Through this paper’s reflection, I want to explore this hitherto under-discussed aspect of interviewee recruitment in digital ethnographies, seeking to bring attention to how media-ideological judgments are involved in one’s choice of CfA at every step of the way and from multiple standpoints. Namely, *the researchers’*, *the users’*, and *the platform designers’* understandings of media and their usability, I argue, all influence the viability of our methodological choices for approaching research participants on social media, in ways that should be reflexively and critically examined.

The discussion will be structured as follows. First, I will consider how the researchers’ views on how to “best” establish contact with participants play a role in the choice of a CfA. To do this, I will briefly

introduce my own doctoral project before surveying and discussing how CfAs were chosen in similar studies (Section 2.1) and what challenges I faced in mine (Section 2.2).

Then, I will present some preliminary insights from a pilot study I conducted, in which I reached out to Facebook users via the platform's instant messaging feature *Messenger*. My experiences in this pilot study shed some light onto users' views of this particular CfA (Section 3.1) as well as the platform's in-built assumptions about the feature's usability (Section 3.2).

Finally, I will present the upshot of my methodological decisions for contacting potential interviewees, highlighting the importance of dynamic and reflexive decision-making (Section 4). Section 5 will succinctly summarize the paper's main points and limitations.

Before the discussion begins, a few terminological clarifications are necessary regarding how I will be referring to technological tools. Following Tagg and Lyons (2021: 727), I use "medium" as a purposely broad term "loosely to refer to an array of channels or modes of communication, platforms, apps and devices." Then, as hyponyms of "medium," I use "platform" to refer to distinct social networking sites like Facebook or Instagram, "app" to refer to their app configurations (or other applications) where relevant, and "channel" to refer to a closer aspect of a medium that is used (e.g., the instant messaging feature of a platform). "Channel" is thus the narrowest term in scope, but it is also underspecified; hence, "channel for approaching" can refer both to sending instant messages via Facebook's Messenger and to making a Facebook post, thereby capturing salient differences.

2 Digital ethnographers seeking interviewees: The researchers' perspective

My dissertation project comprises an ethnographic study of playful, or *ludic* (Huizinga 1949), digital communicative practices arising in and around Facebook groups. A main empirical object of interest, for example, has been the creation and use of so-called "tag groups":

Facebook groups that are ostensibly created not for being joined, accruing members and content posted within, but primarily *for their titles to be tagged in Facebook postings*, thereby functioning as quoted utterances. In examining how users take up the semiotic technology of Facebook groups in such practices, I am thus particularly interested in how the *feature* of Facebook groups, as embedded onto Facebook's *semiotic surface* (Poulsen & Kvåle 2018), plays a role in the shaping of platform-specific communicative practices and, concurrently, of localized meaning-making patterns, filtered and regimented through media ideologies.

A key component of my methods in this project was the conduction of semistructured interviews with Facebook users who are well-versed in using Facebook groups for playful communicative practices. This necessitated establishing contact with participants who would be willing to be interviewed about how they have fun in and around Facebook groups. I thus found myself in a similar position as other ethnographers conducting studies on Facebook; i.e., in need of people to speak to about their practices on the platform.

In what follows, I provide an overview of how interviewees were digitally approached in previous studies like mine to show (i) how the process of establishing first contact with participants through a particular CfA is under-discussed, and (ii) how this same process is shaped by the researchers' (media-ideological) expectations on what may constitute an advantageous course of action.

2.1 Finding interviewees in ethnographies of Facebook

In the searches I conducted for this brief literature review, I managed to identify 20 publications reporting on qualitative social scientific research on Facebook which mentioned direct contact with participants (mainly interviews, but also informal chats) as a methodological component. Of these, I discuss here only those that reported on explicitly *ethnographic* research, which amounts to eleven out of 20. As Hine

(2005) points out, characterizing one's internet research as an ethnographic endeavor constructs online environments as cultural contexts, which serves here as an ontological through line connecting my empirical work with the literature surveyed in terms of its research ethos. The containment of this review's focus on specifically *Facebook*-based studies is done for practical reasons concerning the size and scope of this paper, which mainly focuses on my research experiences, and surveys other similar studies only as a way of contextualizing the discussion.

When examining ethnographies of Facebook for their CfA-related practices, a first revealing observation is that in about half – five out of eleven – studies considered, the channel through which interviewees were approached was not reported at all (Arzadon 2017; Bosch 2009; Georgakopoulou 2017; Oliveira Neto & Camargo Júnior 2019; Susilo 2014). In three of these cases, the researchers reported having *additional* (i.e., *project-external*) *online-offline ties* to the interviewed parties, as they either belonged to the same university (Bosch 2009; Susilo 2014) or they came from the researcher's extended social circle (Georgakopoulou 2017). This effectively constructs one's research "field" from which a pool of potential interviewees can be drawn up as an *online-offline* one. That is, the conception of these studies was seemingly such that contact with participants did not have to be initiated in digitally mediated environments. In turn, this may have reasonably rendered the choice of CfA less of a vital consideration for finding willing interviewees. For example, in Bosch's (2009) study, contact had been previously established with the people who were eventually interviewed, as they were university students who had already been asked to fill out a survey. Similarly, Georgakopoulou (2017) chatted with teenage informants who came from her daughter's friend circle.

Moving on to studies in which a CfA is reported, the convenience sampling approach (Salmons 2014) applied by Georgalou (2017) similarly relied on the researcher's network. In this case, the researcher sought out interviewees starting from her friends and family, who she asked to "forward [a] message to Facebook contacts of theirs" (Georgalou 2017: 27). Georgalou (2017) then emailed the participants

she found through her social circle (Facebook friends of Facebook friends), making email apparently the CfA of choice in this study. The researcher notes that her friends and family ultimately acted as “insider assistants” (King & Horrocks 2010) in this case, thereby “establishing further credibility for [her] study and [...] nurturing honesty and commitment on the part of the interviewees” (Georgalou 2017: 27). It is also pointed out that the researcher’s personal contacts were mobilized only as intermediaries and not as interviewees themselves for a reason: “The simple reason I did not recruit friends and acquaintances of mine was to avoid subjectivity and bias in my analysis” (ibid.). With this statement the researcher evidently sets a limit to the perceived advisability of recruiting participants that are (too) close to her.¹

Like Georgalou, Hosseini (2017) also found willing interviews based on existing contacts, but in this case specifically *online* contacts, namely Facebook friendships from within the religious community she was studying. Regarding her process, she reports initially using Messenger to conduct some interviews, but also notes that she faced some dropping out and reluctance to participate with this method. She then turned to posting some questions directly on the page she studied, after obtaining the administrator’s permission. This created an interview-like setting in the post itself, rather than having the post serve as a gateway to one-on-one discussions, or a CfA in our terms. Importantly, Hosseini reports expecting that the administrator’s permission to post to the community may have bettered her chances at getting responses: “Because the admin knew about the post and accepted it, I hoped it would be more accepted by other members and viewers” (Hosseini 2017: 9). Still, this move proved not to be sufficient for her study and the researcher ultimately had success finding interviewees through established Facebook friendships, as mentioned above.

All in all, to the extent that the studies discussed so far provide information on this, we can observe an emergent trend in choosing how to approach participants, which consists in mobilizing the researcher’s

1 For a discussion of similar views on the appropriateness of ethnographically studying friends and acquaintances, see Grosser (this issue).

existing online-offline network. This appears to have occurred in five out of the seven aforementioned studies, and it presumably boosts the researcher's credibility – an expectation explicitly mentioned by Georgalou (2017) and Hosseini (2017). This state of affairs provides a backdrop against which one's first contact with participants through a chosen CfA does not come "out of nowhere," to the point where the CfA used is mostly backgrounded in the study's presentation (with the exception of Hosseini 2017), either not being mentioned at all (in five out of seven studies examined) or mentioned with no further comment on its potential significance (see the choice of email in Georgalou 2017: 26). But what happens in cases where the researchers are called upon to make a good *first impression* through a digital channel, without this backdrop?

This was the case in the four remaining studies I examined. In all of them, Facebook's Messenger was used as a CfA, either exclusively or in combination with other means. Oreg & Babis (2021) report using Messenger and other online channels to approach interviewees for one of the studies they present (which was conducted by the first author). Acknowledging that "[f]eeling safe is a prerequisite of the willingness to share one's story" (Oreg & Babis 2021: 14), the authors also mention corresponding with participants via Messenger or email for some time, in order to establish rapport before the interviews were conducted.

Also assigning importance to interpersonal ties even as he reached out to "digital strangers," Farquhar (2012) used a snowballing technique, which started with sending out Facebook friendship requests before messaging the users that accepted them. We could thus consider the friendship requests the first CfA, closely tied to Messenger chats as a second stage. Farquhar ultimately befriended 346 users and, out of these, managed to secure 48 interviewees. The snowballing component of his method consisted in asking the users he befriended to "recommend other Facebookers that might take part in the study" (Farquhar 2012: 451).

Overall, establishing an *ad hoc online network* was considered a key move for these researchers, who finally found interviewees through this purposive networking. This is not the same (for our purposes here) as

mobilizing one's existing online-offline network, which may have been established over the course of the study as in Hosseini's (2017) case, but not for the explicit purpose of finding interviewees.

The two final studies I surveyed had considerably less success with Messenger as a CfA, which however may have had to do with their subject matter. Muro Ampuero (2022) studied religious conservatism on Facebook, examining a population tied to "ultra-conservative religious groups" (Muro Ampuero 2022: 1). Even so, he frames the difficulties he faced in finding interviewees via Messenger as surprising:

Since [the examined] groups have many followers, it was thought that finding interviewees would not be a problem. However, most of the people I wrote to did not respond to my messages [...] Near the end of the fieldwork I got a positive response and the opportunity to conduct an in-depth interview. (Muro Ampuero 2022: 5)

Having found only one interviewee thus, the researcher then "had to reformulate the strategy" used for obtaining emic insights (Muro Ampuero 2022: 5), and he distributed surveys instead. These were also sent via Messenger and, out of over 100 users contacted, "only 12 responded" (*ibid.*).

Demant et al. (2019) faced comparable challenges looking for interviewees among a hidden population unified by stigmatized practices, namely drug dealing and buying through social media. The researchers primarily used Facebook (Messenger) and Instagram to message potential participants, encountering difficulties which they directly attributed to the nature of the population: "In some instances, the team contacted over 100 identified sellers or buyers (from posts or profiles) before getting willing interviewees, which is consistent with other hidden population studies" (Demant et al. 2019: 378). The researchers then expanded their method for approaching possible participants, also using Reddit as a channel as well as enlisting the help of acquaintances from their social circle.

Finally, it should be noted that the sensitivity of the research topic may have played a key role in the interviewee-finding process also in Oreg's study discussed earlier (Oreg & Babis 2021) as well as in Oliveira

Neto & Camargo Júnior's (2019) research, which was mentioned earlier among other studies that did not report a CfA. In the former case, the participants contacted were formerly pregnant people who, after stillbirth or prenatal loss, donated human milk to nonprofit milk banks. In the latter, the participants were people living with HIV/AIDS.

Table 1 below provides, by way of summary, a tentative overview of the CfA chosen in the surveyed publications. Also listed are the researchers' connections to the informants contacted, and where relevant, additional notes on the particularities of the research.

The representation of this summary in tabular form unavoidably flattens the complex realities that underlied each study (to the extent that these can even be reconstructed from how the studies were reported in the publications surveyed). The table's messiness is also indicative of two key points: (a) the present discussion does not comprise a deterministic or correlational approach assessing the "effectiveness" of using particular CfAs; and (b) there are no obvious choices when it comes to choosing a CfA.

Regarding point (a), it must be clarified that this discussion's focus is not on finding the "best" individual channel for contacting participants in Facebook- or, more broadly, social media-based ethnographies. Such a decision must always be a dynamic, context-sensitive one that takes into account the particularities of one's project (such as its potentially sensitive topic, as also noted in Table 1). What is discussed here is the role that the researcher's subjectivity plays in this channel-choosing process.

Tab. 1: Overview of CfA chosen and researchers’ connection to participants in previous ethnographic studies of Facebook

Studies	CfA chosen	Researcher connection	Notes
Arzadon (2017)	Not reported	Not reported	-
Oliveira Neto & Camargo Júnior (2019)			Sensitive topic
Bosch (2009)		Researcher’s online-offline network	-
Georgakopoulou (2017)			
Susilo (2014)			
Georgalou (2017)	Email	Ad hoc online network	Sensitive topic
Hosseini (2017)	Messenger, Facebook friend requests		
Oreg & Babis (2021)	Messenger, Email		
Farquhar (2012)	Facebook friend requests, Messenger	Not reported	Snowballing
Muro Ampuero (2022)	Messenger		Sensitive topic
Demant et al. (2019)	Messenger, Instagram messages, Reddit		Sensitive topic, subsequently turned to online-offline network

To approach this, I adopt the view of polymedia, which “shifts our attention from social media as discrete platforms to an understanding

of media environments which users navigate to suit their communicative needs” (Madianou 2015: 1). The point I am trying to stress is that researchers are themselves users navigating media environments, and they are called upon to make media-related choices in the course of their digital ethnographic work. The ideological dimension of these choices needs to be reflexively acknowledged, especially since relevant reflections are lacking in published research. For example, no justification is provided for why email was chosen as a CfA for Facebook users in Georgalou’s (2017) study, although this was presumably a conscious choice that acquires meaning when considered against the non-choice of other available channels. As Madianou & Miller (2013: 175) put it: “Email is not simply email; it is defined relationally as also not a letter, not a text message and not a conversation via webcam.” At the same time, assessing the characteristics of individual platforms or apps in one’s choice of CfA can also helpfully complement one’s reflexive research process, as will be discussed in Section 3.2.

Turning to point (b) – “there are no obvious choices of CfA” – it is important to recognize that, whether reported or not, rationalizations of why one chose what they chose permeate the research process and are not neutral. We can observe examples of this in Hosseini (2014) and Muro Ampuero (2022). Both authors mention instances where their choice of CfAs was not conducive to them finding willing interviewees. In doing so, they report some expectations they had concerning these choices, and how these expectations were not met. This is a first step towards considering the tentative choice of CfAs in digital ethnographic studies as producing teachable moments.

In what follows, I describe the challenges that my own study faced in terms of interviewee recruitment and how they called for continuous reflection and adaptation of my research practices vis-à-vis choosing a CfA.

2.2 Challenges of finding interviewees in my Facebook ethnography

The two main reasons for the difficulties I had in finding willing interviewees for my doctoral project are interconnected. In a nutshell, they can be labelled as (i) the study's "onlineness" and (ii) the study's topic.

I use the term "onlineness" to refer to my project's reliance predominantly on the examination of online spaces. On a programmatic level, my research rejects the fallacy of "digital dualism" (Jurgenson 2012), whereby online experiences are seen as "virtual" and secondary to "real," offline life. Instead, the study's ontological foundations embrace an understanding of contemporary social life as unfolding in an "online-offline nexus" (Blommaert 2018), where strict divisions between "the online" and "the offline" are seen as fundamentally flawed since the two "planes" are intrinsically linked, and whatever boundaries can be drawn between them are inherently porous. Even so, the decision to "go online only" (or an approximation thereof) in carving out a field for one's research is not unprecedented in Facebook-based ethnographies of communicative practices (Georgalou 2017; Procházka 2020), and it has to do with the studies' analytical focus. In my case, this decision was owed to my empirical interest in examining users' *translocal ludic practices enabled by and articulated via Facebook groups*, specifically focusing on the element of mediation (in this case, the platform's digital infrastructure) that is at play in the users' experience of these practices.

When it came to finding interviewees, this onlineness gave rise to an important issue: I was among "strangers on the web." While I myself had been a member of groups similar to the ones I studied (and in fact also of the very groups I chose for closer observation) before my project started, I had been predominantly a "lurker"; i.e., a user who does not actively post but simply observes the goings-on in an online space. As a result, no long-standing relationships had materialised between me and other members of the two specific Facebook groups I chose to focus on in my project, meaning that the help of such contacts could not be planned from the get-go. As I explain in Section 4, I eventually ended up

enlisting the help of a Facebook friend who was also a Facebook group enthusiast, but in the early stages of my study I prioritised finding users who were specifically members and posters of the two groups I had chosen to observe as my “main sites.”

At the same time, the onlineness of my focus meant that the experiences I sought to hear about from my interviewees were based on what we could call “chiefly online” practices, so that no criteria – and hence no strategies – for finding participants could be based on experiences in “offline” contexts, in which participants could then be approached. For example, attempting to find interviewees among the university’s students or staff would be a shot in the dark as much as trying to find interviewees at local barbershops or Catholic churches.

This is because the groups I investigated and the practices I was interested in pertained to playfulness directly involving Facebook usage – and a rather “niche” usage of Facebook’s affordances at that. That is, I was not looking for members or administrators of Facebook groups about, say, the University of Vienna, or any of its programmes or courses, nor for groups grounded in the local barbers’ client base or the local Catholic community – regardless of whether these also spawned Facebook groups or not. Interviewees would need to be engaged in particular ways on Facebook, and thereby be knowledgeable about niche communicative phenomena with a digital origin. For instance, they would need to know what “tag groups” are and how they are used, have some understanding of “weird Facebook” (a label some users adopt for ludic Facebook groups), and potentially also be familiar with other salient cultural signifiers: e.g., terms like “flounce post” (a querulous post made when leaving a group) or “frankentagging” (the practice of tagging parts of different Facebook group titles and thereby “stitching together” an original title). So, any communities of practice that individuals were part of in their online-offline lives beyond this particular thematic space of “playfulness on/with Facebook” (e.g., in institutional contexts, like studying linguistics at the University of Vienna) could not provide any indication that the same individuals would also be avid Facebook group users in the way I was interested in. This contrasts with other Facebook ethnographies discussed earlier, where researchers could readily

leverage existing contacts (partly) rooted in “chiefly offline” contexts (e.g., Georgakopoulou 2017; Georgalou 2017).

All in all, the optimal choice for finding interviewees for my study was, seemingly, to search for them *on Facebook*, and mostly among users I had never met, physically or otherwise. In fact, the connections I established with various Facebook users in this project also turned out not to be a reliable source of willing interviewees (cf. Hosseini 2017). Users who were otherwise highly cooperative over the course of my study, namely the administrators/moderators (or “modmins”) who allowed me to study their groups, did not eventually agree to an interview for various reasons. Out of seven modmins I was in contact with, one cited lack of time; another requested a rescheduling of the interview twice before our plans fell through as there was no interest in a third rescheduling. Two more modmins stopped responding to my messages after initially indicating that they would be interested in being interviewed. The three remaining modmins never expressed interest in being interviewed after I posed my request by addressing them as a group within a group chat that I had been invited into (featuring a total of four modmins and myself).

My study’s topic complicated this matter further. While the main points of my project’s focus were defined from the get-go and remained constant, the identification of empirical objects of inquiry and, more specifically, field sites was an *adaptive* process (Hine 2009). Ultimately, as hinted above, two – explicitly playful – Facebook groups were chosen as the main sites for closer observation, but they were by no means the only spaces observed during data collection. At the same time, while these groups could be defined as somewhat bounded sites which exemplified phenomena I was interested in, finding interviewees from within them proved a lot more challenging than expected. I have already mentioned that I had no long-standing contacts from within the groups. Still, initially, like Muro Ampuero (2022), I expected that the sheer size of the groups’ member base (in the tens of thousands for each group) would render finding some interviewees doable. This turned out not to be the case, even though my chosen topic (playful uses of Facebook’s

group infrastructure) was also conceived deliberately as nothing conventionally considered “sensitive.”

In fact, this latter idea of “non-sensitivity” turned out to be another assumption I had to revisit. As I learned over the course of the study, the sensitivity of online postings, and especially a static understanding thereof, may not be the best working theory for reflecting on why people may not be (and in this case, were not) willing to be interviewed. Traditionally “sensitive” phenomena that potentially also necessitate a different ethical treatment may emerge fortuitously over the course of ethnographic research on social media (see Willis 2019). Indeed, this occurred in my project too, when I unexpectedly found users posting also about, say, recreational drug use or mental health struggles in the groups I was observing. These were groups I had naively conceptualized as sort of “frivolous” in terms of their content and tone, but local understandings of what meets the bar for playful content may vary, as will, generally, the norms about what can or cannot be posted in any given group at any given time.

Further, the user groupings I was observing may be conceptualized as ephemeral “*light*” communities, defined as “focused but diverse occasioned coagulations of people” (Blommaert & Varis 2015: 54, my emphasis), which come together around a “shared focus.” “This focusing is occasioned in the sense that it is triggered by a specific prompt, bound in time and space (*even in ‘virtual’ space*), and thus not necessarily ‘eternal’ in nature” (ibid., my emphasis). Similar to those between, say, people gathering in a pub to watch a football game, or people coming together to discuss how their morning train is late (Blommaert & Varis 2015: 55), the interactions between members of these groups are occasioned by particular postings, presented to them in algorithmically mediated ways. It therefore stands to reason that users’ ephemeral and porous engagement with these Facebook groups as a fleeting aspect of their day-to-day lives may make them uninterested in being cast in the role of “lay experts” for an academic interview. This is because, following this theoretical angle, when we examine how users share memes, Facebook group recommendations, and tag groups, leaving “reactions” and comments on each other’s postings in Facebook groups,

we are dealing with a kind of *ludic membership* (Blommaert 2017), where local cultural knowledge may not be consciously taken on as a solid attribute in one's lifeworld:

An online gaming forum [as an example] is not a school, even if we find organized and tightly observed learning practices on the online gaming forum too. It [sic] turns the gaming forum into a ludic learning environment in which different forms of knowledge practice are invited, allowed and ratified. Such practices – precisely – are “light” ones too – think of “phatic” expressions of attachments such as the retweet on Twitter and the “likes” on Facebook: *knowledge practices not necessarily experienced as such, and rather more frequently seen as “just for fun.”* (Blommaert 2017: 4, my emphasis)

Coming back to the practical realities of my research in such “just-for-fun” spaces, my search for interviewees came to an apparent standstill at one point. For one, as mentioned, members of the administrating teams, with whom I had established closer contact, did not agree to be interviewed. Secondly, a post asking for interviewees that I made in one of the groups yielded virtually no results: it received two reactions and one supportive comment by the administrator that had approved it. So, while the administrator's support was demonstrably present (thereby boosting my confidence as in Hosseini's 2017 case), that still, seemingly, did not make people more willing to be interviewed. Meanwhile, the administrating team of the second group I was studying did not reach a consensus in the matter of allowing me to make such a post at all, for reasons I was not made privy to.

This complicated state of affairs left me with two options. One: to seek out potential interviewees among the groups' members by reaching out to them via private messages; or two: to try and find interviewees outside these groups, possibly also by contacting them individually. Messenger being the only direct option for privately contacting users on Facebook, it seemed like it would be the main CfA I could rely on. This led to yet another conundrum as a pilot study I had conducted showed that using Messenger to contact strangers on Facebook may not be the optimal course of action, for reasons that had to do both with (1)

users' views on being messaged in this way (see Section 3.1) and (2) the platform's relevant settings (see Section 3.2).

3 Findings from a Messenger-based pilot study

While my doctoral project was still in its proposal stage, I knew that it would to some extent involve contacting users that I had had no prior contact with. Hence, I conducted what I have been calling a "pilot study" as an assignment for a course in order to determine what the best strategy may be for establishing contact with informants. My main aim was to test if contacting users from my existing, personal Facebook profile would be preferable, or whether I should use a bespoke Facebook profile. I thus set up a sort of naturalistic experiment, whereby I reached out to users from my personal profile and a purposely created, less personalized "dummy profile,"² in order to (i) get a rough impression of how many responses each one would net, and (ii) subsequently debrief the users that responded, asking them what motivations or rationale led them to respond to my unsolicited message in the first place. To minimize the interference of my message's phrasing, I standardized its content and style across the two conditions.

Overall, 27 members of my chosen Facebook groups were approached in this pilot project (eleven from the personal and 16 from the dummy profile), out of whom only five responded (three out of eleven for the personal and two out of 16 for the dummy profile approach). While no claim can be made for the statistical robustness of this finding given the very small sample, it can be noted that based on these numbers the cumulative response rate was approximately 18.5 %. The five respondents (nicknamed Anne, Collin, Ella, Mandy, and Rick) were first asked to evaluate the perceived trustworthiness of the researcher's approach based on the profile they were contacted from. They were then also shown the other profile and asked if they would have felt differently about responding to a message coming from that

2 The dummy profile has not been altered since and can be accessed via this link: <https://www.facebook.com/profile.php?id=100070005105329> [Accessed 26.06.2024]

one. It is the judgements that were thus elicited from participants that are of particular interest here.

3.1 Users' perspectives on being contacted via Messenger

Participants generally judged the personal profile as inspiring more trust in the researcher by virtue of displaying more information. They reported assessing the researcher's credibility by actively checking various infrastructural elements of the Facebook profile: friends (number, lack thereof); group memberships (any in common); any content/information shared as "public" (or lack thereof); time of the account's creation (new accounts seeming "sketchy"). Negative impressions garnered by browsing these platform features were said to lead to an overall judgement of the profile, and hence the approaching party, as inauthentic: "bot or spam-related" (Collin); "an alt," i.e., an "alternative" profile created in addition to the user's main one (Mandy); "a fake account" (Rick).

These findings already speak to the bearing that media ideologies have on judgements of the researcher's credibility based on the chosen CfA. Participants expressed opinions on varied semiotic conduct that may be read as (in)authentic within a single platform and its features (here: Facebook and the Facebook profile in particular), similar to Ross's (2019) findings on the ideologies surrounding different kinds of Instagram accounts (primary profiles vs. *finstas*, "fake" Instagrams). In Ross's (2019) study, participants construed *finstas* as more authentic than primary Instagram profiles, citing how the former have a smaller audience (an "intimate community" in an informant's words; Ross 2019: 368) while the latter are more curated to garner likes ("it's not your real life"; *ibid.*). Users in my pilot study also distinguished between more and less authentic identities projected in the form of Facebook profiles, contrasting personal (and thus authentic) profiles with "alt" profiles, "fake" profiles (which were here seen as inauthentic, unlike *finstas*), or even accounts not tied to a person but to spam bots.

Importantly, participants mentioned basing their judgement on concrete cues that were readily read off of Facebook's semiotic surface: a recently created profile, a profile displaying few/no friends or little/no public content, etc. Baym (2010) observes that the expectations of less trustworthiness online relate to the fact that people project disembodied identities in digital spaces. In the absence of the body, the reading of cues found in the digital infrastructure becomes a central concern in demystifying others' identities (Baym 2010: Ch. 5).

In the end, despite the pilot study's data being only indicative, the participants' reports presented so far begin to demonstrate the significance of the CfA (here in the connection of one's Messenger texts to a Facebook profile) when it comes to users' assessment of a researcher's first contact with them.

But the most revealing testimonies for the present discussion emerged serendipitously, and they concerned the perceived "sketchiness" of receiving unsolicited messages from non-befriended Facebook users via Messenger. Messages received from users who are not one's friends on Facebook get automatically filed as "message requests" on Messenger. This is an infrastructural feature of Messenger's configuration (both in Facebook's browser version and on the Messenger app) in the form of a separate inbox folder, appearing as an isolated tab that is not prominently displayed. Due to the folder's lesser prominence, Anne and Collin mentioned that they often do not see messages sent there until much later. This built-in feature that isolates messages from "Facebook strangers" (non-friends) thus becomes the basis for a contrastive differentiation with semiotic potential (Poulsen, Kvåle & van Leeuwen 2018): there are "normal" messages (from friends) and mere "message requests" (see also Section 3.2 below).

In fact, participants commented, unprompted, on how these affordances of Messenger are assigned negative indexical meanings. Four out of five respondents described how receiving a message request inspires little trust. Collin mentioned always checking the sender's profile when he receives a message request (presumably for signs of authenticity, as seen above). The female-presenting respondents in particular distrusted message requests with some intensity: Ella was reluctant to trust the

researcher's message given its provenance (a male-presenting non-befriended Facebook user), while Mandy and Anne reported experiencing harassment from male users through this channel, and thus finding it "sketchy" (Mandy) or treating it with apprehension (Anne).

All in all, these preliminary findings indicated a negative perception of Messenger message requests among some users, while also showing how the embedding of this CfA on Facebook's platform invites a series of practices on the participants' end, which ultimately inform their subjective perception of the researcher as trustworthy or not. Still, the participants' perspectives form only one of many parts of the picture when it comes to the viability of choosing a certain CfA. In fact, it is not only users (researchers and participants) who harbor particular expectations about the use of media; platforms do too, by design.

3.2 Platform-imposed limitations to Messenger's use

I have so far focused on the assumptions of social actors (researchers and research participants) as they factor into the process of finding willing interviewees in one's digital ethnographic study, specifically when it comes to approaching users through a particular channel "out of the blue." Yet, assumptions are also embedded within technological tools themselves (Poulsen, Kvåle & van Leeuwen 2018). As Gershon (2010: 285) points out: "While we cannot speak of the 'intention' of a particular medium, science and technology studies have shown that designers often embed implied users and implied causal narratives within the structure of the technology." This aspect must also be taken into account when choosing a CfA.

This was a salient consideration in the pilot study I am reporting on (and my subsequent research practices). Although I have so far presented negative views of Messenger shared by participants, it could be argued that using Messenger as a CfA did lead to some – arguably limited – success in finding users willing to be speak with me. Why could the same strategy of messaging non-befriended Facebook users en masse not be

adopted for the whole project (similarly, e.g., to Farquhar's 2012 strategy of massively sending out friend requests)?

An argument against this arose from my pilot study and had to do with the rules governing the use of Messenger itself as dictated by its design. Sending out message requests en masse would amount to spamming – and not only for the users contacted, but also *for the platform*. I found this out when, during my pilot study, I received a chat ban on my dummy account after messaging 16 users. An investigation of the Messenger Help Center's cited causes for chat bans suggests that the volume of messages I sent may have been the culprit ("You sent a lot of messages recently"; Meta 2023c). The same page also includes recommendations for the prevention of similar bans, the most relevant one here being: "Once your block is over, please send messages and friend requests only to people you know" (Meta 2023c). The existence of this "disciplinary" feature paired with a clear instruction to refrain from contacting non-friends (and indeed even from befriending people one does not "know") means that sending out message requests in droves is not a viable strategy also from a technical standpoint (at least in the version of Facebook in which the present observations were made).

At the same time, in the information found on Messenger's Help Center page for explaining chat bans, one also encounters Facebook's "real name" policy as an additional expectation for how the medium is *meant* to be used. This policy is directly tied to texting other users via Facebook Messenger. Not only should contacted users be "people you know," but one is also given the following instruction for preventing chat bans: "Use the name you go by in everyday life to help the people you're messaging recognize you" (Meta 2023c). This points to the relevance that Facebook's conception as a "*real name*" platform has for researchers seeking to establish contacts on it.

This characteristic of Facebook is a key trait of the platform and has consistently been noted by researchers, but we also need to reflect on what it practically means for researchers-as-users reaching out to other Facebook users. In their early study, Zhao, Grasmuck & Martin (2008) distinguished Facebook as a "less anonymous" (or "nonymous") social media platform, where connections may be "anchored" in offline

relationships (see also boyd & Ellison 2007: 221). This norm is actively enforced by Facebook. The platform's guidelines prescribe that Facebook profiles should be based on users' legal names because "Facebook is a community where everyone uses the name they go by in everyday life" (Meta 2023a). Should there be grounds for the platform to doubt the legality of the name on one's profile, Facebook issues warnings to users, asking them to change their listed name and provide confirmation of its legal status by showing identification documents (Meta 2023b). While adherence to these "real name" guidelines is by no means total (see, e.g., Baym 2010: 109), this state of affairs may create an environment where users approached by the researcher might feel more exposed by virtue of being contacted under their legal name, in contrast to, for example, platforms like Reddit, where usernames not based on legal names are the norm – and, in fact, can even be generated by the platform itself.

In the end, aspects of a platform such as its "real name" policy or chat ban regulations (which may also be discovered through trial and error) are important considerations to take on when choosing a CfA. Using the theoretical lens of polymedia introduced earlier entails approaching first and foremost individuals and their practices, as polymedia is chiefly interested in people's attachments to media in a larger mediatized environment (Madianou & Miller 2013). Yet, taking stock of a particular medium's affordances is also necessary when specific channels for contacting potential interviewees are chosen.

While affordances are less of a static given and more of a reality dynamically co-constructed by the users making use of a technological tool (Hutchby 2001), platform-introduced norms and the (automated) enforcing actions they may entail are a key part of the puzzle. In the case of Facebook, the platform as a center of authority normatively constructs users interacting on Messenger as "people who know each other" and/or "use the name they go by in everyday life." Therefore, as a digital ethnographer, it is important to consider before "going in" how the adherence to these normative expectations influences: (i) the infrastructure's features and regulating measures (e.g., filing messages by non-friends as message requests, issuing chat bans), and (ii) the users'

stances towards being contacted via a channel like Messenger by non-friends: Can they not reasonably expect to be among “people they know” on this platform?

4 Resolution: How I found interviewees and what I learned

The insights I gleaned from my pilot study (Section 3), paired with the challenges inherent in my research design (Section 2.2), led me to approach potential interviewees through my personal profile and, most importantly, avoid writing to users I had not befriended. This amounted to a mobilization of my existing online-offline network, as commonly done in studies like mine (Section 2.1).

First, I sought out the help of a Facebook friend who I had come in contact with due to our shared interest in Facebook groups, and who then connected me with five more willing interviewees. This effectively resulted in a snowballing strategy. Another willing interviewee was found through a common acquaintance who knew of my and the interviewee’s shared interest in playful Facebook groups. Two final interviewees (for a total of nine) were also found through my circle of Facebook friends. In this latter case, the Facebook friends were acquaintances who I had known for reasons unrelated to Facebook groups but who also were not close friends or family members of mine. They responded to a post I made on my personal profile asking for interviewees for my project – a different eventual CfA.

All things considered, my interviewee recruitment process exemplifies a case of actively considering the CfA’s role in a Facebook-based ethnography. Namely, I reflected on my own (ideological) expectations as a researcher for what the “right” CfA might be, also informed by previous researchers’ practices, and additionally taking into account both the platform’s affordances/embedded assumptions and users’ ideologies about being contacted via Messenger, as revealed in a small pilot study.

These reflexive practices build upon established ideas regarding digital ethnographers' need to attune to the digitally mediated environments they conduct their research in:

In an online space, [...] an ethnographer has to find a way to be active using the technologies that are available for communication with participants in that space in order to create a dialogue that allows for mutual understandings to develop. This might involve using the public space of a forum or social media profile but also include private interactions using emails and private messaging. *An online ethnographer needs to develop a sense of the appropriate etiquette for each mode of interaction.* (Hine 2017: 321, my emphasis)

While in the passage above Hine mostly refers to the distinction between public and private channels' perceived appropriateness, her use of the word "etiquette" points to communicative norms in a given space which are subject to differential evaluation. While, from a sociolinguistic standpoint, these norm configurations can be readily described as "microhegemonies" in Blommaert's (2018) sense, on a higher level of abstraction their entrenchment in people's perceptions and their association with different communication channels ("modes of interaction" in Hine's terms) reframes them as media ideologies. In this paper's reflection, I have attempted to stress that ideologies about how media ought to be used must be considered when choosing a CfA, and indeed from multiple perspectives; namely, asking:

1. What are *my assumptions*, as the researcher in this particular study, regarding the question of what channel would be most suitable for contacting participants?
2. What are my potential *research participants' views* on the channel in question (to the extent that I have learned about them)?
3. What are the *designers' assumptions* embedded into this piece of technology based on its affordances and internal regulations?

As a one-size-fits-all approach to choosing a CfA in digital ethnographies of social media is impracticable (let alone undesirable), I propose questions 1-3 above as general guidelines that can be

dynamically adapted to one's study. My hope is that these insights stemming from my own doctoral research experiences may prove helpful for other (early-career) digital ethnographers of social media communication.

5 Conclusion

When conducting digital ethnographies of social media (or indeed, in general), it can be daunting to try and find people to have an honest-to-god conversation with. Through this paper's reflection, I hope to have shown that there are no obvious choices when it comes to choosing through what channel to approach people for an interview in digital spaces. Rather, the social understandings of media must be comprehensively considered.

Still, the list of points I have raised as worthy of consideration is by no means exhaustive. For example, the (linguistic) design of one's messages when approaching users in digitally mediated settings is also crucial for the establishment of trust and rapport. While it has not been covered here for reasons of space, this matter requires its own dedicated treatment as it intersects with complex questions concerning the researcher's positionality and identity performance, audience design, and semiotic ideologies more broadly.

All in all, the significance of adopting a reflexive and critical stance towards every aspect of one's methodological choices is paramount in digital ethnography. The semiotic ideologies at play in interviewee recruitment in particular are a matter that applied linguists, and especially those of an ethnographic persuasion, are uniquely suited to examining. When it comes to choosing a CfA, such judgements may make all the difference, figuratively speaking, between approaching someone in a safe space or walking up to them in a dark alley.

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Resolving ethical issues in an online corpus of mixed public-private messages: A reflexive account

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Abstract

Dieser Beitrag befasst sich mit den ethischen Fragen, die bei der Arbeit mit privaten und öffentlichen Daten derselben Personen auftreten können. Für eine Untersuchung des Einflusses von Kommunikationsgeräten (Computer, Smartphone) auf die Sprache in der computervermittelten Kommunikation erstellte ich ein neues Korpus, welches aus Nachrichten von denselben Personen auf zwei Plattformen besteht: Twitter (eine öffentliche Plattform) und Discord (ein privater Server). Die Pseudonymisierung von Namen reicht nicht aus, um die Nutzer:innen zu schützen, da ihre Identität durch die öffentlichen Tweets angreifbar ist. In dem Beitrag werden diese und ähnliche ethische Fragen sowie mögliche Lösungen vorgestellt, bei denen die Achtung der Privatsphäre der Teilnehmer:innen mit der Wahrung der akademischen Integrität in Einklang gebracht werden muss.

Schlagwörter: Digitally-mediated communication, ethics, affordances

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1 Introduction

The last four decades have seen both huge growth and rapid developments of digitally-mediated communication (DMC): from the beginning of personal computing and access of the internet to the general public in the 1980s and 90s, to the rise of mobile computing in the late 2000s, and to our current daily life full of various digital devices and increasing digital convergence (Bröhl et al. 2018; Jenkins 2008; Kjeldskov 2013; MacKenzie 2013). DMC research too has changed significantly over time, both in terms of research interests and methodological approaches. While the first wave was primarily interested in simply cataloguing “characteristic” features of DMC like emoticons and acronyms (<LOL>), the state of the art is far more complex, with increasing focus on how such resources are used for social and interactional purposes (Androutsopoulos 2006). This has been accompanied on the one hand by the deployment of sophisticated online ethnographic methods (ibid.; Bolander & Locher 2014), and on the other, by the compilation and analysis of increasingly large corpora, as technological improvements have made it easier for linguists to download messages from a variety of platforms (cf. Nguyen et al. 2015). The speed of this progress, particularly in the ability to collect more data for study from individuals, makes it prudent to continue to re-examine the ethical dimensions involved in DMC research (cf. Tagg & Spilioti 2022).

The current paper presents a reflexive account of some ethical considerations regarding the analysis of a corpus of DMC messages, compiled as part of my dissertation project on the influence of the communication device on microlinguistic features. What distinguishes this particular corpus is that it comprises both public and private messages from the same participants. Specifically, the messages are collected from one of two platforms: Twitter/X,¹ a micro-blogging

1 Note that among other changes to this platform, it has recently been renamed from “Twitter” to “X.” I continue to use “Twitter” throughout this paper, both as that was its name during data collection and to enable easier searching for readers interested in this platform specifically.

platform with a maximally large audience possible (cf. boyd & Crawford 2012; Pavalanathan & Eistenstein 2015), and Discord, a platform on which private chat servers can be created by communities such as the one the participants are part of (cf. Kiene et al. 2019). That is, while any person with an internet connection can read the Twitter messages used in the corpus, only fellow server members have access to the messages taken from Discord.

The data provides a rare opportunity to examine messages from the same users in such different dimensions of context. Most studies of language use in DMC analyse a corpus comprising of messages from a single platform or mode, whether it be a *public* platform such as Twitter (cf. Ilbury 2020; Pavalanathan & Eisenstein 2015; Shoemark et al. 2017) or online forums (cf. Androutsopoulos 2023; Bieswanger 2016) or *private* chat apps like WhatsApp (cf. Busch 2021; Siebenhaar 2020) or SMS (Thurlow & Brown 2003). While some studies do use messages from multiple modes, the corpora structure differs here as well. For example, Verheijen (2018) compares linguistic variation across four modes, Twitter, WhatsApp, SMS, and instant messaging; all but Twitter are private communication. However, each subcorpus corresponding to a platform has been collected from a different group of donors. In contrast, Tagliamonte (2016) examines messages from same users across three different modes, email, SMS, and instant messaging, but all three are private.

In short, when compared with other DMC corpora, the current data is relatively unique in respect to the private-public factor. However, it also provides some complex methodological challenges when keeping with the Association of Internet Researchers' original main ethical guideline: do no harm (Ess & the Association of Internet Researchers 2002). To explore the ethical dimension thoroughly, the paper begins with a brief overview of the project that the corpus was compiled for, as well as introducing the corpus and participants (Section 2). The topic of private-public data is also explored in more depth, following the approach of Landert and Jucker (2011) of differentiating between access and content (Section 3). With this, it is possible to explore the key issue of how to respect the participants' privacy (Section 4.1), and the possible

solutions to do so (Section 4.2). The paper concludes with some brief thoughts on the importance of reflecting on and openly discussing ethical issues related to our research (Section 5).

2 Overview of the project and corpus

The aim of my doctoral project is to explore the influence of the communication device on linguistic variation in DMC; the “communication device” here refers to the physical technology used to produce and send messages, most commonly a phone or computer (cf. Jucker & Dürscheid 2012). This topic was explored to some extent in the earliest wave of linguistic research on DMC. Overall, the characteristic features of DMC (Section 1) were analysed as developing as a result of the communication being mediated by technology. As typing is slower than speaking, the principle of parsimony and linguistic economy are especially important in DMC, which leads people to use abbreviations, omit punctuation and capitalisation, etc. (cf. Androutsopoulos 2011; Crystal 2004; Thurlow 2001; Werry 1996). Furthermore, as paralinguistic cues used in face-to-face communication, e.g., laughter, body movements, tone, are unavailable in DMC, new text-specific contextualisation cues were developed, such as the repetition of letters and punctuation (<good morninggg!!!!>), non-standard capitalisation (<GOOD MORNING!>), and emoticons (Carter 2003; Ferrara et al. 1991; Herring 2001). Comparing linguistic variation across the device types, the consensus was that the phone’s smaller keyboard and screen led to even greater linguistic economy on the phone (Cougnon & Farin 2012; Frehner 2008; Herring 2004; Herring & Zelenkauskaitė 2008; Ling & Baron 2007).

These explanations were eventually criticised as overly technologically deterministic: they described technology as having an inevitable, autonomous effect on language use, while ignoring or minimising the role of social factors and users’ agency (Squires 2010). Current research has thus adopted the concept of affordances to describe the influence of technology on human behaviour more generally, and language variation

specifically. Affordances are action possibilities; they are based in the material properties of a technology and shape what is easier or harder to accomplish, without ultimately constraining it (Bucher & Helmond 2018; Hutchby 2001). Furthermore, as Section 1 notes, the focus has shifted from technology to exploring the use of linguistic features across different contexts, by different groups of people, and for different interactional purposes within DMC (Androutsopoulos 2006; Bolander & Locher 2014; Squires 2010). However, this shift has meant that there is little current systematic research on linguistic variation across the computer and phone. My dissertation seeks to fill this research gap without returning to technological determinism. Rather, I examine the affordances of a device type as one influence among many on language use.

For the empirical study, I decided on a mixed-methods approach: both qualitative but especially quantitative methods are used to investigate linguistic variation across device types and other dimensions of context. In particular, the project re-examines earlier claims about the effect of device type on microlinguistic features more robustly. For example, I compare the statistical frequencies of non-standard capitalisation across device types, but then also qualitatively compare the *motivation* for non-standard capitalisation in individual messages on the computer and phone.

Part of the project thus involves constructing a novel corpus that can be used for such analyses – one which avoids the Observer’s Paradox (cf. Bolander & Locher 2014). This means the social media platform(s) from which messages are collected must somehow display the device type used to write the message with within its metadata, which narrows down the choice of platform to only several possibilities. For example, the popular messaging service WhatsApp can be accessed both on the phone via an app and on the computer via the “WhatsApp Web” site. However, WhatsApp does not display what device type the interlocutor is using as part of its user interface. At the time of data collection, two sites that did were Twitter and Discord; note that Twitter stopped doing

so soon after it was acquired by its new CEO.² Both platforms were chosen rather than only one in order to explore the interaction between the influence of device affordances and other contextual factors thoroughly.

A small group of users who post on both platforms were approached regarding the project. These individuals are members of the book community: specifically, they engage in online fandom of sci-fi and fantasy books, either as book bloggers or as authors themselves. Book bloggers review books online and thus promote them via electronic word-of-mouth (cf. Kelly-Holmes 2016; Murray 2016). Promotion via such (micro-)influencers has become an increasingly important part of the marketing branch of the book community; they are typically not paid, although they may receive free ARCs (“advance review/reader copies”) of the book from the publisher or author (Jaakkola 2022; Moody 2019; Steiner 2010). Instead, book blogging is both a hobby, part of their online fandom engagement (Kutzner et al. 2019), but also a way to earn symbolic capital within their community, building an online identity as a trusted expert and micro-celebrity (ibid.; Albrecht 2017; Moody 2019; Reddan 2022; cf. Khamis et al. 2016).

The eleven users whose messages comprise the corpus are members of a Discord chat server of a few dozen book bloggers and authors. The server thus provides a private space for the users to chat privately about books, book blogging, and (events within) the broader fandom community; it is also used by the members to chat about other topics such as their private life, other forms of media, politics, etc. In contrast, the public platform Twitter is used primarily to promote books, and their own blogs, to a greater audience of fans. These differences are illustrated by the examples below. In Example (1), a short Discord conversation, the users are discussing their opinion on a book they both moderately enjoyed; the extract is clearly an informal conversation between friends





2 Musk (2022): “And we will finally stop adding what device a tweet was written on (waste of screen space & compute) below every tweet. Literally no one even knows why we did that ...” Retrieved from: <https://twitter.com/elonmusk/status/1592178009410531330> [Accessed 26.06.2024]

who are both aware of each other's past reading. Example (2) is a fairly typical tweet within the corpus: an update promoting the user's new blogpost by listing several books. In short, the platforms are used for very different purposes by the participants, and the users have a different audience in mind when writing the message. The corpus consists of roughly 25,000 messages per platform, gathered sporadically over the course of a year.

Ex. 1:

[Nora 44051 Computer Discord]	oh, Leila, i finished reading witchmark
[Nora 44052 Computer Discord]	i see what you mean. it was good, but not great
[Leila 44053 Phone Discord]	A bit rushed at the end right?
[Leila 44054 Phone Discord]	Yeah

Ex. 2:

[Tereza 9211 Computer Twitter]	Final batch of mini-reviews and I am caught up!
	 The Hod King
	 The Lady's Guide to Petticoats and Piracy
	 Cursed Bunny
	 The Emperor's Babe
	[URL LINK TO BLOG]

3 Privacy and publicness in DMC

As Examples (1) and (2) show, there is a difference between the platforms Discord and Twitter on several levels in terms of the degree of publicness and privacy. At the basic level, the platforms differ as to who has access to the content of the messages. This distinction has been long-standing in DMC research: in her classification scheme for DMC, Herring (2007) differentiates between public, semi-private, and private communication. Public messages are searchable (cf. boyd 2010); that is, the message can be found again if the reader searches for the text within

the platform. Such data is often used by researchers studying DMC without asking for the user's consent, e.g., in large-scale Twitter studies (cf. Nguyen et al. 2015; Pavalanathan & Eisenstein 2015; Shoemark et al. 2017). However, boyd & Crawford (2012: 672) note, "[j]ust because content is publicly accessible does not mean that it was meant to be consumed by just anyone," and warn that accessibility should not be used to justify the ethics of collecting data without consent.

For this small-scale corpus, I asked the users for permission to collect both their Twitter and Discord data. At the time of data collection, Twitter was a maximally public platform: typically, anyone with internet access could read any message posted, although users did have the option to lock their account to be read by followers only, and one-to-one private messaging also existed. Since then, Twitter has changed its privacy rules, and now an account is necessary to access tweets; while accounts are free and simple to create, this does now technically make the platform semi-private. The platform Discord has the option of creating public, semi-private, or private servers; public servers are searchable via the platform's server discovery page, while private servers require an invite link. Some invite links may be posted publicly: for example, communities on the public, asynchronous platform Reddit may add a Discord community server for faster-paced chatting (cf. Kiene et al. 2019). The particular server examined here does not have an open invite link posted anywhere, and is thus fully private.

However, Landert & Jucker (2011) argue that accessibility is not the only dimension along which the public-private distinction must be analysed. Another important axis is the topic or content of the messages, which they describe as follows: "Private topics are those that affect single individuals or very small groups of people while public topics are those that lack this concentration on a private individual or a very small group" (Landert & Jucker 2011: 1427). Private topics are more likely to involve sensitive and personal information, while public topics include, for example, scientific facts or international sporting events. Private topics are more likely to be discussed within privately accessible communities, and vice versa. However, there can be a certain amount of blurring of boundaries, and the differentiation along the axes should be

considered a continuum rather than absolute categories (ibid.; Bolander & Locher 2014; Tagg & Spilioti 2022).

Most of the community members also explicitly describe a difference between what they are willing to discuss on Twitter and Discord. As part of the project, I conducted a questionnaire with them after data collection was complete. While it focused on their device habits and ideologies, I also asked about how they perceived the two platforms. Many of their answers centre around the public-private distinction in topic:

- *“I’m awkward as hell on twitter because I’m very conscious that anyone can see what I write there. It also feels more formal, which I’m less comfortable with.”* (Michael)
- *“I find twitter is more shouting into the void and discord is for conversations with friends. I am always aware on twitter that people I don’t know will be reading what I put out there, and while I’m fairly unfussed about what I share, there is a line between public and private information.”* (Eliza)
- *“I’m way more down to earth on discord. I’ll usually proofread my tweets a bunch, vs discord which is just... type and go!”* (Nora)
- *“Hmm I’d say I’m less guarded on Discord. If only because I know I’m among a set group of people, and nobody I don’t know is going to jump on something I say, or take it out of context based on a misreading.”* (Roy)
- *“I think each platform has its differences. Public vs private is a big one, I always take more care with what I’m saying on twitter. [...] I’m also pretty shy so much more likely to just like and retweet rather than answer, but discords are safer spaces when I can be my true awkward self. I avoid commenting on controversial subjects on twitter because I don’t have the energy for that.”* (Tereza)

The users make clear that they are more careful about what they write on Twitter, especially in regard to potentially controversial topics and sensitive information. In contrast, they treat Discord like a safe place to interact with friends, and thus are less careful about their interactions. This division can be seen in the topics discussed within the corpus, with

a much larger proportion of Discord messages concerned with the everyday. Furthermore, even when discussing media, they differ in how they express their opinions between the platforms. As illustrated in the examples below, they are more likely to express a strong negative opinion in the private Discord (<holy shit do I hate> in Example 3), while hedging negative evaluations on the public Twitter (<Unfortunately, it wasn't my cup of tea!> in Example 4).

Ex. 3:

[Leila 44032 Phone Discord]	I...
[Leila 44033 Phone Discord]	I mean I did find something but holy shit do I hate these soap opera romances
[Leila 44034 Phone Discord]	It's soooo over the top angsty and dramatic

Ex. 4:

[Leila 22803 Phone Twitter]	Unfortunately, it wasn't my cup of tea! Hopefully you'll get to watch it soon!!
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One final aspect to note here is the association, although also not absolute, with the difference in standard language use across each of the platforms: language in messages directed at a larger, public audience has been found to be more likely to adhere to orthographic norms (Pavalanathan & Eisenstein 2015; Shoemark 2017; cf. Landert & Jucker 2011). In Examples (2) and (4), written on Twitter, the participants use standard capitalisation; Leila even uses a comma in Msg. 22803. In contrast, Examples (1) and (3) on Discord contain all-lowercase messages (<i see what you mean> in Msg. 44052) and tokens with letter repetition (<soooo> in Msg. 44034). The analysis within the dissertation finds that these examples reflect a broader statistical trend regarding linguistic variation across the two platforms, as does Nora's comment on proofreading her tweets in a way she does not with Discord messages.

Altogether then, it can be concluded that for the participants there is a very clear contrast in public-private between the two platforms. First and foremost, there is a technological difference regarding accessibility. However, this difference is also reflected in the topics the users choose to discuss on each platform, in their explicit metalinguistic understanding of the platforms, and in the style of language they use on each platform. Furthermore, maintaining the privacy of the Discord messages means not only making sure the users are not somehow identified in real life, but also, and to some extent more importantly, that their privately shared opinions do not become public among their broader online community.

4 The ethics of a private-public corpus

With the importance of the division between publicness and privacy in DMC thus established, this section turns to discussing the ethics pertaining to an empirical analysis with public-private data. The first half (Section 4.1) introduces the ethical issues which may arise: searchability of public messages, possibility of participant identification via researcher, and danger of participant tracking due to the large quantity of messages in the corpus. The second half (Section 4.2) discusses some potential solutions: avoiding certain types of analysis, reproducing only public or private messages, substituting participants' public messages for unrelated others', altering reproduced messages so they become unsearchable, avoiding reproducing certain private messages, but also potentially *heightening* risk to meet participants' desires for culture sensitivity.

4.1 Ethical issues

Discussing how to do DMC research ethically, Tagg and Spilioti (2022: 96) describe a general guideline: "the more public the site and the more open the access to it, the less urgent is the need to protect participants' privacy." The strict division between the public and private platforms

for these participants thus indicates that the privacy of their Discord messages must be handled with utmost care. However, a crucial issue arises here due to the searchability of the public tweets (cf. boyd 2010). Pseudonymisation, that is, changing the names/nicknames, is the most important and basic way to protect the anonymity of participants posting privately: using a pseudonym when discussing a user and reproducing their messages within a paper or dissertation prevents their identity from being discovered (cf. Bolander & Locher 2014; Buchanan 2011; Tagg & Spilioti 2022). However, in this case it is not enough. Anyone searching for the text of the Twitter message itself would be able to find it easily; they would thus immediately know who the pseudonyms “Leila” and “Tereza” actually belong to.

A further issue is my own involvement with this community: the reason that I have access to the private server and these participants is that I also do book blogging. While I have been “on hiatus” since starting my dissertation (and never did any message collection around the time periods I was active in the community spaces so as to minimise any accidental influence from my own device use), I am still on close terms with some of the participants and other members within the book community. While I am not active in those fandom spaces under my full name, that is, I do not blog as “Jenia Yudytska,” neither am I very careful about hiding my identity; my Twitter profile, for example, identifies me as both a book blogger and a linguistics doctoral student. The problem here is that as I myself am findable, so too is my broader network, and thus potentially the participants.

Robson (2017) describes just such a problem with regard to his own role as digital ethnography researcher when he conducted a long-term study of a public forum used by Religious Education teachers. While the access to the forum posts is public, the topics discussed by its members can be relatively sensitive, and thus are relatively private (cf. Landert & Jucker 2011). Therefore, when reporting his findings, he never published direct quotes from the participants, using paraphrases instead. However, he had interacted with the participants on the forum publicly in his role as researcher, under his real name. Thus, googling for him and the forum topic meant that the participants could be found, and

subsequently identified based on the paraphrases. His solution was to simply delete his messages on the forum and thus sever the connection. However, this is impossible in my case, as it would be extremely difficult to remove all traces of my involvement in the book community across multiple platforms: even if I were to remove my own messages, I am also on occasion mentioned in others' messages and blogposts.

Finally, there is a more general problem with the quantity of metadata within the corpus. As mentioned in Section 2, the corpus is quite large at ca. 50,000 messages; that is, the more prolific of the participants have contributed two to five thousand messages on each platform. The participants were informed that I would be collecting messages over the course of a year, and were also informed about the topic of my dissertation, that is, that I would specifically be tracking their use of computer and phone. However, as researchers on internet ethics have pointed out, users are not always aware of how much information is being collected in aggregate, which complicates the notion of "informed consent" (boyd & Crawford 2012; Buchanan 2011; Tagg & Spilioti 2022).

In particular, one of my original research interests was to explore the motivation for and potential impact on linguistic variation of device switching: participants switching from the computer to the phone or vice versa during a conversation. For example, several participants indicated within the questionnaire that they may switch to the computer when typing longer messages. As part of my preliminary attempts at investigating such device switching, I used the `{ggplot2}` R package (R Core Team 2022; Wickham 2016) to create Figure 1, based on the timestamps of the participants' messages. Each row in Figure 1 is one participant, and each dot is a message that they wrote; the graph shows a timespan over the course of several days.

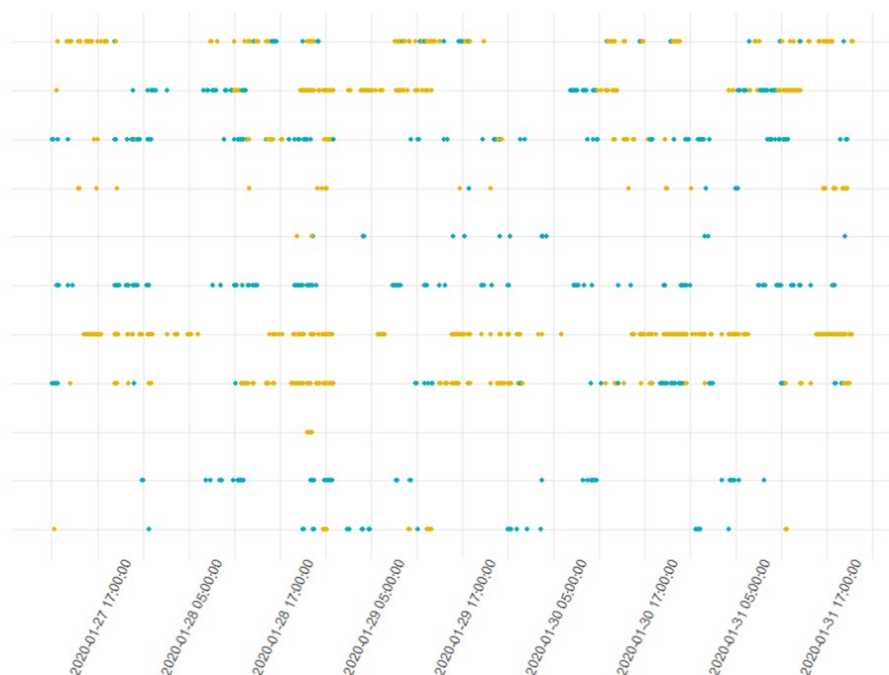


Figure 1: Messages posted by each participant over the course of several days; blue messages have been posted via the phone and yellow via the computer

The graph in Figure 1 was meant to provide a rough overview of device switching, so that timespans with more switching could be analysed qualitatively in more detail. During this period, the community was very active and the participants were posting constantly throughout the day. Thus, what I had inadvertently created was a graph to track the users', who are all in different time zones, sleeping patterns. In his blog article, "How you can use Facebook to track your friends' sleeping habits," the software engineer Louv-Jansen describes producing a similar graph (Louv-Jansen 2016). He had realised that his friends checked Facebook upon waking up and right before bed; thus, with a simple script to record their online status, he could track their sleeping patterns with a high degree of accuracy. With the data in my corpus, it is possible to go

one step further: some of the participants describe using their phone primarily in a mobile context of use, that is, when they are away from the computer. Examining device switching in this way thus means tracking their movements, albeit with a very basic categorisation of stationary vs. mobile.

4.2 Potential solutions

I believe that the most important and basic part to solving an ethical dilemma within the research is to weigh whether the analysis at hand is worth doing at all. In my project, there are two major issues, the issue of a potential discovery of private data via public data, and the issue of unintentional tracking. These issues were resolved in different ways. For the unintentional tracking, I simply decided to abandon the investigation into device switching within the dissertation. While I am still interested in this topic, an additional round of consent gathering would be required to ensure the participants are truly informed (cf. Tagg & Spilioti 2022), and device switching may be better analysed via screen recording instead in any case. In regard to the principal guideline of “do no harm” (Ess & the Association of Internet Researchers 2002), the main problem would be if participants were somehow recognised and their constant online communication throughout the day would cause difficulties at their workplace. In short, the potential risks and obstacles severely outweigh the potentially limited research benefits; in fact, I decided to avoid using timestamps altogether when showing message examples, as another way to limit tracking.

Similarly, it would be possible to resolve the issue of the public-private data by taking a purely quantitative approach to the analysis. Graphs and statistical models can be used to investigate trends of linguistic variation across device types and platforms, without any messages being shown. A related potential solution would be to reproduce only private or public messages. While I do primarily take a quantitative approach in the dissertation, I rejected the idea of not showing any messages. Importantly, a reproduction of the messages

helps to clarify the analytic argument being made. For example, the quantitative analysis finds a significant difference between messages produced via the computer and phone in their use of capitalisation, with more omission on the computer than the phone, due to the latter's auto-capitalisation. Nora's Discord message in Example (1) (< i see what you mean. it was good, but not great>) helps explain this finding more clearly than only a graph would.

Furthermore, while not the primary focus, I *did* compare phone-based and computer-based messages qualitatively as an important part of the analysis. Messages should thus be shown so as to support the reproducibility of the findings (cf. Weller & Kinder-Kurlanda 2016; Winter 2020). Winter (2020) describes *replicability* of research as the ability to reproduce the findings of a study on *novel* data, and *reproducibility* of research as the (more basic) ability of another researcher to reproduce the findings of a study given the *same* data. The minimal requirement for reproducible research is thus that the data is made available in some way, so that other researchers can come to their own conclusions, thus disagreeing with or reproducing my analysis. Due to the mixed public-private nature of the corpus as described in this paper, the full corpus cannot be shared openly, but the bare minimum is to show certain pertinent messages for others to examine.

One potential solution I considered but also ultimately discarded was to show Discord messages from the participants and the corpus, but to show Twitter messages from unrelated users within the broader book community instead. As tweets are public, informed consent is arguably less important (cf. Spilioti & Tagg 2022). Many others in the community use similar linguistic strategies to promote books. For example, the tweet below (Figure 2) is from a publishing company, that is, from a public company posting on a public platform. Like the tweet in Example (2), it uses emoji as bullet points, and thus could technically be used in its place to illustrate this stylistic choice within the book community. However, this approach was rejected for two reasons. On the one hand, boyd and Crawford's (2012) warning that accessibility should not be taken as justification is valid, especially when considering that I would be using data no one gave me consent for to protect the corpus data that

I *did* have consent for; on the other, finding illustrative, unrelated examples is extremely time-consuming and difficult.

What fanfiction teaches writers:









- ✍️ to be humble: you're bending characters to your will, but within someone else's context
- ✍️ structure
- ✍️ to be ENTERTAINING and keep people coming back for the next chapter
- ✍️ characterization, diving into the interiority of characters' heads

Figure 2: Tweet from a publishing company, not part of the corpus

Ultimately, I took two main precautions in order to protect the users' identity and privacy. The first was to anonymise the public tweets even further. Names and any locations were all pseudonymised. Moreover, every tweet was altered slightly when reproduced, so that it would become impossible, or at least far more difficult, to search for. That is, every tweet within this paper has been changed slightly. Example (5) below illustrates this procedure: the tweet from Example (1) has been changed one more time. This involved changing all book titles, and sometimes changing emoji and adjectives or nouns to their synonyms. As the focus is on microlinguistic features, the exact book or adjective used is deemed less important than the overall structure, and graphic features, of the tweet. For example, the original book title Tereza mentions is neither <The Emperor's Babe> nor <Assassin's Apprentice>, but it does use both standard capitalisation and an apostrophe. To check that this step of the anonymisation worked, I tried searching for sections of each altered message on Twitter's built-in search engine; if the tweet still appeared in the search results, I altered the message further and re-checked it until this was no longer the case.

While this means the data does not *completely* fulfil the criteria for reproducibility described above, analysing the private-public divide for the participants in depth led me to conclude that it is more academically sound to protect my participants' privacy than to reproduce the examples one-to-one. Each message is shown with an ID, however (e.g., Msg. 9211 in Example 5). This allows the original to be found easily within the corpus, so if absolutely necessary to answer any questions, it could potentially be briefly shown to specific individuals.

Ex. 5:

[Tereza 9211 Computer Twitter]	<p>Final batch of mini-reviews and I am caught up!</p> <p> The Hod King</p> <p> The Lady's Guide to Petticoats and Piracy</p> <p> Cursed Bunny</p> <p> The Emperor's Babe</p> <p>[URL LINK TO BLOG]</p>
[Tereza 9211 Computer Twitter]	<p>Last batch of mini-reviews and I have caught up!</p> <p> The Constant Rabbit</p> <p> The Gentleman's Guide to Vice and Virtue</p> <p> Prometheus Bound</p> <p> Assassin's Apprentice</p> <p>[URL LINK TO BLOG]</p>

The Discord messages I left unaltered, other than changing book titles if the participants were discussing a negative review, or if the Discord message was somehow linked to a reproduced Twitter message. This is part of the other precaution taken, which is to simply avoid or minimise reproducing messages from private topics within the private data (cf. Buchanan, 2011; Landert & Jucker 2011). As described in Section 4.1, even if the Twitter data is altered enough to become untraceable, I as the researcher and the community member am still a vulnerable point of

access to the participants' identity. Moreover, those most likely to recognise the participants through me are fellow members of the wider book community – and it is among them that the reputation of the participants could be damaged if private opinions became known. Again, the focus of the dissertation is various microlinguistic features, and not larger discourses; it serves no scientific purpose to use the most controversial, sensitive, or otherwise private material from the Discord messages. Therefore, it should be and is avoided. With this, even if the participants are found, the risk of harm to them should be minimised even further.

One final point, however, concerns heightening risk rather than lowering it. Two of my participants are from a first/second-generation immigrant background, now living in Western Europe. I had originally planned to pseudonymise them using a name traditional to the country they currently live in, as there is an increased risk of identification with using a name from their home culture. Firstly, there are overall comparably fewer sci-fi and fantasy book bloggers of their cultures in the (English-speaking) online book community: the pool of potential “suspects” that these pseudonymised users could be thus becomes far smaller than if they are given stereotypically white (Anglo) names. Secondly and more crucially, the participants can be found through their connection to *me*, and as my own network of book bloggers is overall not exceedingly large, the pool of “suspects” from their cultures now becomes limited to a few persons.

Nevertheless, past guidelines point out the need for cultural sensitivity when conducting research; paradoxically, marginalised users may at times desire greater visibility (franzke et al. 2020; Tagg & Spilioti 2022). When taking part in a friend's research project, I had had my own experience of an Anglo pseudonym being chosen for me, and feeling oddly uncomfortable at seeing a quote from me published under an Anglo name. Consequently, I asked each user directly what they would prefer, after explaining my thoughts about potential risk of identification. Despite the warning, both wanted a name from their home culture, and even supplied me with a suitable pseudonym themselves. Because the participants expressed their preferences so clearly, and also

because I have done my best to mitigate risk in other ways, such as avoiding reproducing sensitive messages, I decided that the increased risk of identification was outweighed by the need to respect the participants' cultural identity. This example underlines the importance of, where possible, working with the participants to ensure that they are protected ethically in a way that matches their preferences.

5 Conclusion

The aim of this paper was to provide some ideas about potential issues and potential solutions for researchers interested in working with DMC data. While all (empirical) linguists face ethical dilemmas throughout our research, it is rare for us to have the opportunity to discuss the deliberations behind our choices in-depth. In particular, there is little public space for us to admit to *not* undertaking analysis specifically out of ethical considerations. Thus, for me, the decision to reject investigating device switching via timestamps was accompanied by the strong worry that I was over-thinking the issue, abandoning a promising novel direction of research over nitpicky moral qualms. In addition to offering some concrete potential ideas on how to tackle ethical issues in DMC research, more broadly, I hope that this paper is useful to other young researchers as a transparent illustration of the thought-process behind the choices taken and *not* taken in such studies.

Nevertheless, it is important to stress that the decisions taken here are not necessarily right for all studies. Most importantly, my study is primarily quantitative in nature, and the reproduced text messages are just one part of the analysis. If my dissertation were to focus on close reading or other qualitative methodologies, it would arguably be far more important scientifically to reproduce the message accurately; hence, another approach to dealing with the data ethically would have to be chosen. As discussed already in the Association of Internet Researchers' original recommendations from 2002, a "recipe" for ethical research of DMC is impossible, but that does not mean there are no guidelines or responsibilities for researchers either (Ess & the

Association of Internet Researchers 2002). Rather, a sometimes-complicated series of choices is involved in ensuring that the best possible measures are taken to ensure the participants' privacy.

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Retrospective: Reflexive insights from applied linguistics

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The articles in this Special Issue exemplify different forms of reflexive practice in applied linguistics PhD projects. In bringing these threads together, it is imperative to consider the dimensions and transformative potential of reflexive practices in applied linguistics. Reflexivity involves critically examining one's own perceptions, biases, assumptions, and preconceptions, and it thereby fosters awareness of one's positionality and its influence on the research process. This self-aware approach adds to the validity and reliability of academic work by promoting transparency (May & Perry 2017).

In contrast to a historical emphasis on objectivity, reflexivity acknowledges the subjectivity of scholars, particularly within fields employing qualitative methods. It promotes active recognition and examination of sociohistorical contexts, thereby challenging traditional notions of objectivity and positioning investigators as active participants in shaping the outcomes of their studies (Starfield 2012).

Despite a reflexive imperative in various social sciences, applied linguistics has been relatively slow in recognizing and incorporating

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this dimension into practice (Consoli & Ganassin 2022; May & Perry 2017). However, the significance of this concept in the field is becoming more apparent, as numerous studies show (e.g., Copland & Creese 2015; Giampapa & Lamoureux 2011; Pérez-Milans 2013; Sharma 2021). The conceptualization of reflexivity in applied linguistics draws on the broader “reflexive turn,” a change in perspective during the 1980s in many of the social sciences (Archer 2010; Bachmann-Medick 2016; Foley 2002). It involves an ongoing, multifaceted, and dialogical process where scholars critically reflect on their own origins, biography, locality, and intellectual bias. Therefore, reflexivity transcends mere self-observation in the field; it encompasses discourses or representations that involve acknowledging and embracing the complexity and messiness inherent in the process of conducting a study (Byrd Clark & Dervin 2014: 25).

Particularly for junior scholars, there is a tendency to view successful research as a linear and seamlessly transitioning process without obstacles between the initial conception of an idea and the eventual publication (Copland & Creese 2015). However, the reality is far more nuanced, involving a continual oscillation and reassessment of various elements, including oneself, methods, data, and results. These processes often unfold unconsciously, becoming apparent and rationalized in hindsight during a retrospective examination of events (Fleck 2019). Embracing reflexive practices allows academics, especially those early in their careers, to confront the complexities of their work in order to get a better understanding of the iterative nature of the research process.

Yet, the view of an idealized research practice extends beyond early-career academics. No matter their career stage, scholars always risk becoming seduced by the idea that adhering to “correct” methodologies, or “eating your methodological greens” as described by Najar (2014: 196), guarantees high-quality outcomes. Subscribing to this mindset can cultivate feelings of self-moralization and self-doubt when real-world outcomes differ from the anticipated results of meticulously followed methods. In such situations, there is a temptation to politely ask reality to align with our prescribed methodologies, rather than

engaging in adaptive approaches that address the complexities inherent in empirical work (Law 2007).

Reflexivity holds transformative potential as well. Its significance becomes apparent when we try to transition from established paradigms to alternative theoretical traditions. Letting go of seemingly set-in-stone procedures while acknowledging the advantages of exploring alternative approaches contributes to both personal projects and broader academic contexts (Tsang 2022).

Roshanak Nouralian's paper portrays the pursuit of new theories in the field, often requiring a complete reorientation to understand them. Through her work, she emphasizes the vital role of openness and curiosity in advancing PhD studies and academia as a whole. Roshanak's contribution can serve as an inspiration for young scholars, encouraging them to question established methodological norms. Further, she highlights that embracing the unfamiliar also fosters innovation and facilitates intellectual growth within the community.

In my own contribution, I (Carina Lozo) show how reflexivity can be used to assert a stance amidst conflicting perspectives. By providing a reflexive account, I offer insights into the complexities of my own liminality, thereby shedding light on the obstacles and tensions inherent in navigating multidisciplinary perspectives. Additionally, my contribution points to the importance of a supportive community, emphasizing that collaborative environments are essential for fostering individual growth, idea exchanges, and collective advancement in the respected field.

As PhD students often grapple with challenges diverging from the "expected" issues in the field, the exploration of uncharted and niche-like research gaps becomes a common experience. This unfamiliar terrain occasionally imposes a responsibility on junior scholars to address problems, the scope of which sometimes proves unpredictable. This aspect is vividly illustrated in Vinicio Ntouvlis's paper, which provides a thorough analysis of the methodological decisions required to establish contact with study participants in digital settings. Reflecting on his doctoral project, Vinicio emphasizes the importance of dynamic decision-making that considers the role of the researcher, the

researched, and the instruments (communication channels in this case) to overcome unexpected obstacles encountered along the way.

Jenia Yudytska's paper shows the dual significance of PhD research: Addressing emerging challenges during one's own project while also shaping the field's future trajectory. Her innovative privacy measures set a precedent for scholars facing similar conundrums. By navigating ethical complexities, Jenia demonstrates the importance of reflexive research approaches and how they contribute to advancing knowledge in the field with ethical integrity.

As positionality and disposition strongly influence their projects, it is also important for academics to turn their attention inward. By meticulously documenting and critically analyzing their experiences, academics can enhance the transparency of their methodologies and decision-making processes. This is exemplified by Florian Grosser's paper, which provides a reflective account of his fieldwork in Japan. Originally intended to investigate communicative competence, Florian's study evolved into an ethnographic exploration. He looks into the ways in which his presence in the field affected him personally, prioritizing this aspect over solely focusing on its effects on participants and the study's environment. The paper stresses the integration of personal experiences with academic rigor and highlights the importance of incorporating subjective perspectives into scholarly practices. Through reflection, Florian demonstrates how his presence in the field directly informed adjustments to his methods.

In the end, reflexive practices in PhD work serve as a tool for self-efficacy and enable early-career scholars to reflect not only on their challenges but on their achievements as well. Recognizing personal growth and accomplishments fosters a sense of resilience, a crucial element for those traversing the demanding terrain of doctoral studies (Tsang 2022).

This collection of papers shows how important it is for early-career academics to recognize their responsibility and agency in shaping the research process. The authors advocate for departing from traditional methodologies; they instead encourage the adoption of more flexible stances that are responsive to the dynamic nature of their projects'

contexts. The contributions highlight the value of embracing new trajectories, whether by exploring innovative tools, addressing emerging gaps, or challenging established paradigms.

In acknowledging that the role of emerging scholars significantly adds to and shapes new directions for the field of applied linguistics, this Special Issue has served as a dedicated platform for delving into methodological reflections, showcasing both achievements and challenges faced during doctoral studies.

As we look into the future, it becomes evident that reflexivity in applied linguistics offers a gateway to understanding the intricate pathways of academic work. By embracing a self-aware approach which considers the interplay between researchers and their contexts, we pave the way for more transparent and inclusive scholarly practices. This journey illuminates the complexities inherent in our studies and empowers us to embrace challenges with resilience and adaptability, ultimately shaping the trajectory of applied linguistics.

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