Practical Guide to Qualitative Methods for Media and Communication

Produced in MMC 9102 Researching Communication II in Spring 2024 with Dr. Adrienne Shaw at Temple University in the Klein College of Media and Communication. Syllabus and course design sponsored by a Textbook Affordability Project grant from Temple University Libaries. Syllabus available here: http://dx.doi.org/10.34944/dspace/10514

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Recommended citation: Alzahrani, Y., Artoglou, M., Das, M.C., Glubok, V., Luca, M.L., Sabb, T.N., Sissay, M.A., Vuorinen, M., & Yang, X. (2024). *Practical Guide to Qualitative Methods for Media and Communication.* In Shaw, A. (ed) MMC 9102: Research Communication II, Spring 2024.

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Introduction to This Practical Guide

This is a first of its kind collaboratively developed document by first year PhD students at the Klein College of Media and Communication Studies, Spring 2024. This is a work-in- progress and is open for editing and updating year after year via adaptation. It provides a step-by-step approach of different kinds of qualitative research that can be applicable depending on the nature of the research and the preference of the researcher. We hope that by reading it you will be able to better use these methods. We also hope that through the process of writing the guide, we too become more familiar with these research methods. Together, we will help guide each other to be better researchers in the world of qualitative media and communication research. 💙

This practical guide is developed to support researchers, particularly in academic settings, by providing a blueprint for qualitative research in media and communication studies. This guide is for graduate students, including masters and PhD students who are interested in conducting qualitative studies. This guide might be helpful for early career academics and scholars.

You can find both software tutorials and methodology guidance. We provide you with a tutorial of Zotero, a citation management system, and applications specifically designed for qualitative data analysis. In the methodology section, you can find explanations, step-by-step guidance, and examples for human-based methods (i.e., ethnography, interviews, community-engaged research), text-based methods (i.e., textual analysis, discourse analysis, content analysis), historical analysis, and digital media research with a focus on TikTok. Ethical concerns and IRB guidelines are also covered.

This practical guide includes several chapters that introduce readers to a myriad of qualitative digital research methodologies that have been commonly applied in the field of media and communication. The main points of discussion regarding each specific method cover explanation and practical usage, step by step walkthroughs, pros and cons, limitations and implications, and examples of application in media research areas such as social media and video games.

This guide was focused on methods that were of interest to the groups of students who wrote it, but does not represent an exhaustive review of all qualitative research methods. If you notice any gaps or inaccuracies, we welcome you to adapt this into a new edition under the same creative commons license. 💙

Chapter 1: Introduction to Qualitative Research

Qualitative vs. Quantitative

You need to know that the distinction between qualitative and quantitative methods/theories:

- are increasingly challenged and blurred, with many studies integrating both approaches
- can be viewed as a continuum rather than as mutually exclusive models
- is NOT about whether one uses NUMBERS

Aspect	**Quantitative**	**Qualitative**
Epistemological Foundation	Objective reality; researcher as an unbiased observer.	Fluid reality; multiple perspectives; interconnectedness of facts.
Objective	Identify variables, properties, and relationships; hypothesis testing.	Understand meanings, actions, and constructed realities.
Approach to Data	Seeks causality; emphasizes empirical measurement.	Focuses on emergent realities; theory from interpretation.
Use of Theory	Often tests existing theories.	May develop theories from data analysis.
Analysis	Statistical analysis; more rigid.	Interpretive; looking for themes and patterns.
Role of Researcher	Detached observer; minimizes subjectivity.	Actively involved; acknowledges subjectivity.
Nature of Reality	External, singular, objectively understandable.	Socially constructed, multifaceted, subjective interpretation.
Methodology	Structured; emphasis on quantification and statistical analysis.	Flexible; qualitative; adaptive to context and subjectivity.
Data Collection	Surveys, experiments, statistical analysis.	Interviews, observations, text and document analysis.
Outcome	Generalizable results; laws or general propositions.	Context-specific understanding; descriptive, detailed insights. Specific to cases studied; data can drive the theory, rather than theory driving data collection
Validation of Knowledge	Through empirical testing and replication.	Credibility based on coherence, depth, and consistency.

Misconceptions about qualitative research

Many social scientists believe that qualitative research lacks rigor, objectivity, and generalizability, which are common misconceptions that do not accurately reflect the value of qualitative research (Alasuutari, 1995). Becker (1996) also noted that some critics argue that qualitative research lacks external validity, cannot be used to make conclusions about larger populations or settings, and cannot tell between good or bad data. The major misconceptions are highlighted and countered in the following paragraphs.

Lack of Rigor: Qualitative research is often thought to lack rigor when compared to quantitative methods. Critics argue that it is subjective, biased, and not replicable. However, this view fails to acknowledge the strong methodologies and systematic approaches that underlie qualitative inquiry. Charmaz (2014) introduces the concept of "constructivist grounded theory," which highlights the active role of researchers in constructing knowledge from data through iterative processes of coding, memoing, and theoretical sampling. By highlighting the systematic and rigorous nature of grounded theory methodology, Charmaz challenges the notion that qualitative research lacks methodological rigor. Similarly, Creswell and Poth (2016) offer techniques such as member checking, triangulation, and prolonged engagement to enhance the reliability of data collection and analysis.

Limited Generalizability: Qualitative research has limited external validity, which means that it cannot be used to draw conclusions about larger populations or settings. This is often a point of confusion and misconception when evaluating the credibility of qualitative research. According to Becker (1996) the accuracy of qualitative research relies on how well the phenomenon being studied has been observed or measured, rather than on whether two different observers would reach the same conclusion. Charmaz (2014), too, argues that qualitative research aims not at statistical generalization but at theoretical generalization, which involves developing concepts and theories that can be applied to similar contexts or phenomena. Through detailed case studies and theoretical discussions, Charmaz demonstrates how qualitative research can contribute to theory development and generate insights that have broader applicability. While qualitative findings may not be statistically generalizable in the same way as quantitative research, they offer rich insights into the complexities of social phenomena and inform theory development (Creswell & Poth, 2018).

Subjectivity and Bias: Qualitative research is accused of being inherently biased and subjective because researchers are involved in data collection and analysis. Critics argue that the researchers' preconceptions and interpretations can unduly influence the findings, thus compromising the study's objectivity. To objectively determine the quality of qualitative work, it is better to rely on a set of criteria and consider work that is based on close observation of a wide range of factors relevant to the issue at hand as superior to work that relies on inference or more distant forms of observation (Becker, 1996). Charmaz (2014) emphasizes that qualitative research can maintain neutrality and objectivity by being aware of one's assumptions, biases, and preconceptions throughout the research process.

Time and Expense: Another common misconception is that qualitative research is time-consuming and costly. While it is true that qualitative research requires a significant investment of time and resources, qualitative research is relatively inexpensive. Some studies have shown that qualitative research can be more cost-effective than

quantitative research, especially regarding data collection and analysis (Creswell, 2014). Qualitative research also allows flexibility and adaptability, saving time and resources in the long run.

The misconceptions about qualitative research are, therefore, ungrounded. It is a rigorous and valuable methodology that offers unique insights into complex social phenomena. Becker (1996) explains that practitioners of qualitative and quantitative research may appear to have differing philosophies of science, but they work in distinct situations and ask different questions. The politics surrounding social science can trick us into exaggerating these differences, but this should not be the case. The combination of qualitative and quantitative methods in social research is a major concern for quantitative researchers as it produces hypotheses, whereas qualitative researchers focus on the questions to be answered rather than the procedures to be followed (Becker, 1996).

Judging Qualitative Studies

Christians and Carey (1989) suggest that the following four criteria can be used to judge a qualitative study's competency:

Naturalistic Observation: Because qualitative research is centered around human interpretation, it is important for researchers to determine those interpretations by observing phenomena in their natural contexts. A key defining difference between quantitative research and qualitative research is that, while quantitative research often replicates phenomena to study in the contextless setting of a lab, qualitative research aims to observe them in their natural settings. Because of this, researchers should immerse themselves in the situations they plan to study.

Contextualization: Because qualitative research aims to study phenomena within their natural contexts, researchers need to be very well versed in the contexts of what they study. Christians and Carey (1989) argued that researchers must pay distinct attention to the context of any given object of examination: "Because symbols carry meaning invested by the situation, environments become crucial for proper understanding…meaning is not determined by statistical indexes of external behavior but by context" (p. 362). The specific symbols and environments in which phenomena are observed must be understood by the researcher in order to make sense of the observations. Across cultures and across history, symbols and events are reinterpreted and reworked, and their meanings therefore change and evolve. By understanding and explaining contexts, researchers can better comprehend nuances and connections in their research. For example, a researcher interested in studying a particular group's attitudes towards a particular cultural text must take into account that group's history, and what other meanings that cultural text has had for other groups.

Maximized Comparisons: Another one of the criteria proposed by Christians and Carey (1989) is maximized comparisons–in other words, whether or not researchers engage in substantial comparative analysis. The concept of maximizing comparisons comes from Glaser and Strauss, who introduced grounded theory. In qualitative studies, comparison does not refer to testing a hypothesis under multiple conditions, but rather selecting multiple comparison groups to improve the explanatory power of a researcher's interpretations. Much in the same way that researchers need to be aware of the cultural and temporal context of their research object, it is also beneficial to make connections across space, place, culture and time in order to gain a fuller, more accurate picture of any phenomenon. For example, Christians and Carey (1989)

suggested that researchers studying modern pornography may look towards the depictions of sexual acts in ancient art. Researchers can use natural socially identifiable settings for comparison groups. While researchers may look to specific settings for their comparison groups, their goal is to shed light on larger structures and systems at play by selecting parts of a social whole to conduct deeper analysis. It is important to note, however, that not all comparisons across time or space are applicable. Remember, researchers cannot necessarily judge the past by the same standards as the present; make sure that the context of the comparison makes sense.

Sensitized Concepts: Here, Christians and Carey refer to using systems of categorization to better paint a picture of a researcher's observations. Sensitized concepts are open-ended frameworks that allow researchers to make sense of their interpretations and represent complex cultural concepts. Christians and Carey (1989) refer to sensitized concepts as the building blocks of qualitative inquiry because they can capture layers of meaning.

Data Collection

In contrast to quantitative research methods in which data collection succeeds the establishment of theory, data collection using the qualitative grounded theory method is utilized to derive theory. The qualitative research process begins with data collection followed by early analysis of the data, and this coupling continues in an iterative manner throughout a research project. Qualitative research data focuses on characteristics and qualities and enables the uncovering of meaning and significance as it pertains to the subject of the research.

The types of raw data that can be collected takes many forms and can include environmental scenes, participant interviews, documents, multimedia recordings, and other visual or physical artifacts. Once an initial set of data has been gathered, qualitative coding is applied to study, sort, and synthesize the data (Charmaz, 2014). The coding process allows various data elements to be categorized together and labeled based on similarities for comparison and further analysis. As the research process continues, there are additional opportunities for the researcher to identify and collect new data for grouping and comparison with the existing or revised coding structure for greater accuracy on the path to theory development.

Grounded Theory

Grounded Theory is a qualitative research method that enables us to derive new theories based on the iterative collection and analysis of real-world data (Delve Qualitative Data Analysis Tips**,** 2021). It is one of the most highly used approaches in qualitative research.
In other research approaches, we may formulate a hypothesis and then attempt to prove or disprove it, but in grounded theory, this differs. For instance, the non-Grounded Theory approach to research involves developing a hypothesis, such as "social media usage impacts book reading habits," and then collecting data to determine whether or not the theory holds. In this way, it would not be considered grounded theory (as shown in Figure 1). With Grounded Theory instead, we first collect and analyze data and then develop theories based on the data itself (as shown in Figure 2). So, we may go out and collect data, interview social media users, and from the data, we will derive our theory (Delve Qualitative Data Analysis Tips, 2021).

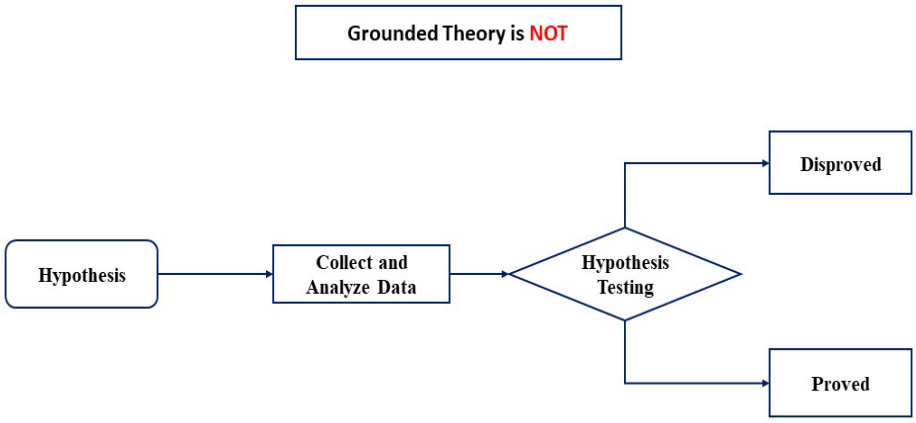

Figure 1 (Adapted from Delve Qualitative Data Analysis Tips, 2021, 0:25)

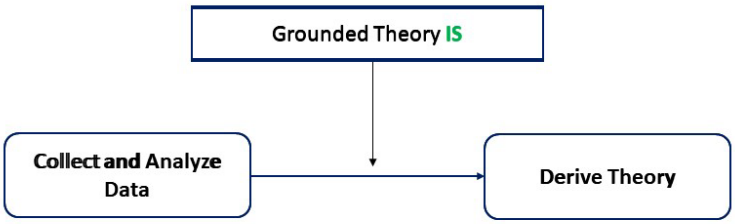

Figure 2 (Adapted from Delve Qualitative Data Analysis Tips, 2021, 0:50)

Another thing to note is that Grounded Theory is not a process (as shown in Figure 3) where we collect and analyze data, and then derive our theory in distinct steps. Instead, it is a process in which we go out into the world, collect data, and analyze that data iteratively (as shown in Figure 4), and from that, we derive our theory. So, with Grounded Theory, our theories are derived from real-world data, and data collection and analysis occur iteratively (Delve Qualitative Data Analysis Tips, 2021).

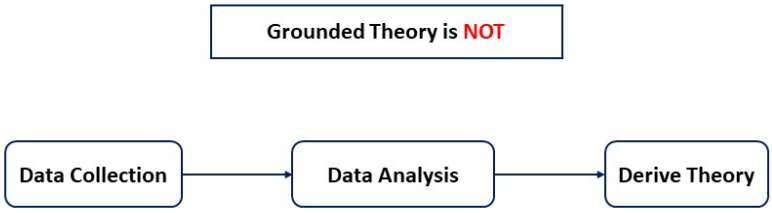

Figure 3 (Adapted from Delve Qualitative Data Analysis Tips, 2021, 1:07)

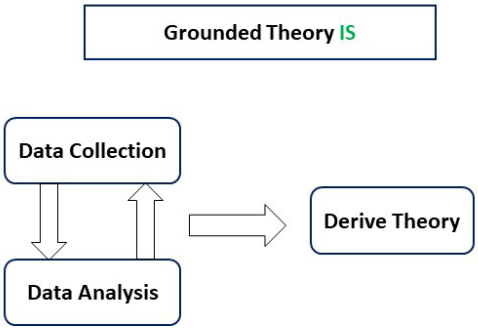

Figure 4 (Adapted from Delve Qualitative Data Analysis Tips, 2021, 1:19)

Finally, we can say that grounded theory focuses on discovering theory through research. The process generally goes like this:

- Notice phenomenon or cultural text of interest
- See what has been said about topic
- Engage in preliminary research
- Conduct data collection
- Reevaluate data and analyze
- Go forth and sample as needed
- Coding/analysis etc.
- Creation of theory, if applicable
- Project (Charmaz, 2014).

When should we use Grounded Theory?

We can choose Grounded Theory when there is no pre-existing theory that adequately explains a particular phenomenon we intend to study. Alternatively, if there is an existing theory, it may potentially be incomplete because the data used to develop that theory was not collected from the same group of participants we now intend to research (Delve Qualitative Data Analysis Tips, 2021).

The Cycle of Grounded Theory

Grounded theory is a qualitative method that enables the researchers to derive new theories through an iterative cycle of collection and analysis of real world data. The sequence of data collection and analysis is not fixed or linear but rather cyclical, adapting as the research progresses.

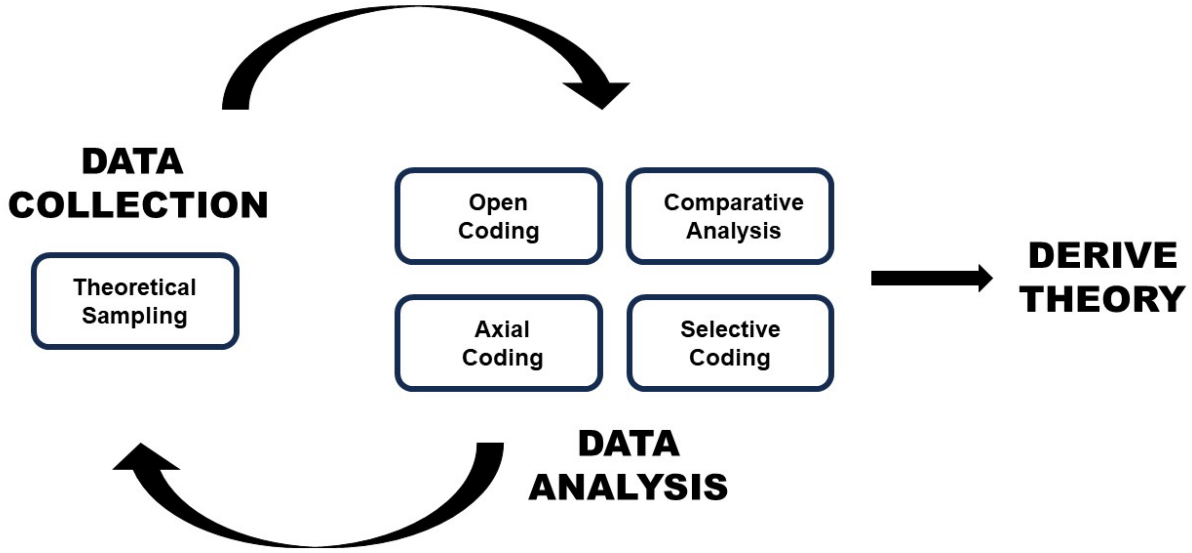

Figure 1. The Cycle of Grounded Theory (Adapted from Delve Qualitative Data Analysis Tips, 2021).

Data Collection

Theoretical sampling is adopted to recruit participants aiming toward "theory construction rather than representativeness" (Charmaz, 2014, p. 8). Researchers usually start with one or a small group of samples (e.g., for an interview), and iteratively and purposely repeat this step, combined with data analysis, in the theory development. The researcher simultaneously collects and analyzes their data so as to best decide where to sample next. For example, a researcher conducting a project on teenager's perceptions of themselves and their self esteem might notice teen girls were reporting more negative associations. The researcher would then sample more teen girls.

Data Analysis

Open coding: Break up raw data (e.g., transcripts) into excerpts and group them into codes.

Comparative analysis: Use constant comparison methods to compare new data (gained through more theoretical samplings) with existing codes, then update coding and grouping methods during *each stage of analysis*.

Axial coding: Find connections between codes and group them into first-order categories, then continue data collection and comparisons to refine the categories.

Selective coding: Find one or more second-order core categories that connect all the codes and categories, and formulate the basis for the theory.

According to Charmaz (2014), the following are important to the process of grounded theory:

Codes and categories are generated from data, not from predefined hypotheses
Writing memos could help researchers to refine the categorizations and identify the relations
You are looking for "saturation" to find you have enough samples. If you are hearing the same ideas and concepts in later interviews, then you are done and do not need more research; you have all the codes you need. The exact number is not going to be known by you until you start researching. (If you are really looking for a range, 10-30 interviews are good. Sample goes up as the population range of identities increases.)
Literature review is also a step after, not just the part before, conducting an independent analysis

Theory and Grounded Theory

Positivist and Constructivist

A common distinction between qualitative and quantitative research, is the difference between constructivist and positivist epistemologies. Positivism places importance on "objectivity, generality, replication of research, and falsification of competing hypotheses and theories" (Charmaz, 2014, p. 4). This principle is more easily applicable to quantitative research, and makes qualitative research more difficult to conduct. The constructivist turn in American Academia in the 1990s is markedly against this concept. Constructivists advocate for knowledge being created instead of discovered, and being provincial, or different depending on perspective.

For Christians and Carey (1989), positivism (or Empiricism) is "the inverse of qualitative studies" (p. 358), and the purpose of qualitative research is to bring a critical lens to scientific inquiry, describing categories that are then grown past and discarded. This is still an iterative model of science, but one that disregards objectivity. This does not mean that positivist qualitative methodology is impossible. Charmaz (2014, 232) describes some of the differences within Grounded Theory, a qualitative approach, between a Positivist approach and a Pragmatist one (with pragmatism being aligned with a constructivist approach). Charmaz states positivist understanding follows the scientific method, assumes an unbiased observer, and explains empirical phenomena, while a pragmatist understanding assumes an indeterminate reality and studies actions to solve emergent problems. Both approaches, however, hold that truth is provisional. Note that Social Constructivist research IS different from Social Constructionism. The difference to Charmaz (2014) is an acknowledgment of "subjectivity and the researcher's involvement in the construction and interpretation of data" (p. 14).

Objectivist Grounded Theory

Objectivist grounded theory derives from positivism; it claims neutrality and conceptualizes data without an interpretive stance (Charmaz, 2014). Objectivist grounded theory builds on "theoretical categories that serve as variables" and seeks generalizable theory" (Charmaz, 2014, p. 235). Objectivist grounded theory is fundamentally empirical and does not focus on the "'historical, social, and situated processes' which through the data emerge" (Charmaz, 2014, p. 237). Therefore, objectivist grounded theory erases social context and does not situate the researcher in the research reflexively or transparently.

Objectivist grounded theorists do not get involved in the realities and lives of their research participants (for example, they do not practice ethnographic research), but their research may include some observational methods. In general, objectivism assumes that data is separate from the researcher and that the researcher does not have any impact on the data. As Charmaz states, “[a]n overall goal of the objectivist approach is to develop theoretical generalizations abstract from particularities of time, place, and situation” (2014, p. 238).

Constructivist Grounded Theory

Instead of seeking a universal generalizable theory, the constructivist grounded theorist examines how and why “participants construct meanings and actions in specific situations” (Charmaz, 2014, p. 239). Constructivist grounded theory contextualizes the research findings through its participants, their reality, and social situations, where the participants are located in addition to the broader environment. “A constructivist approach theorizes the interpretative work that research participants do, but also acknowledges that the resulting theory is an interpretation. The theory depends on the researcher’s view; it does not and cannot stand outside of it” (Charmaz, 2014, p. 239). The data arises from “shared experiences and relationships with participants and other sources of data” (Charmaz, 2014, p. 239). By observing and interacting with the participants in their real-life contexts, the researcher collects data, analyzes, and interprets the data to turn it into a theory grounded in the data (Charmaz, 2014; Delve Qualitative Data Analysis Tips, 2021).

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Chapter 2: Research Ethics for Qualitative Media and Communication Research

Institutional Review Board:

What Qualitative Media & Communication Researchers Need to Know About the IRB

The institutional review board (IRB) regulates research involving human subjects. You will need IRB approval for any **human subjects research** you conduct as an affiliate of a U.S. university. While the IRB is based on national laws, each university has its own board, which have their own idiosyncrasies. This guide is based on the Temple University IRB procedures, though much of the information will still be useful to media studies and communication scholars based in other institutions. If you are conducting research in a non-US location, you should still follow these guidelines for IRB approval if you are associated with an American university, though any stricter guidelines for the local country you are researching do take precedent.

The IRB is most interested in your research methods, how you will recruit participants for your research, how you will protect personally identifiable information, and how you will acquire informed consent for your research. While IRBs often provide an informed consent template, you will likely want to change it depending on your research. Changing the language of your consent sheet to be more informal, altering it to not require keeping a record of participants name, or gathering consent verbally instead of through a sheet are all common and accepted ways of gathering informed consent. Recently, many boards are encouraging qualitative researchers to move away from physical forms. Be sure to note in your application to the IRB how you will gather consent.

At Temple University, you are required to include the CV of all researchers working on the project. In addition, there must be a principal investigator (PI) for the research, and the PI MUST be a faculty member, not a student. This changes from one university board to another, but at Temple University you must have a faculty member if you want to conduct research as a graduate student. Temple, like many other universities, requires CITI certification before you conduct your research. This training program covers much of the information about research ethics and laws covering research.

If, after acquiring IRB approval, you need to make modifications to your research, you will sometimes need to tell the IRB and get approval for your modification. If it’s something small, i.e., the wording of questions to participants, approval for the modification is not required. But changing how you collect data or recruit participants does require informing the IRB. These modifications go through a quicker review process.

After acquiring approval, you will have three years to conduct your research before IRB approval becomes lapsed. After three years have passed, you will need to get extended approval if you wish to continue the research.

Remember, the IRB staff are people. You can always talk to them or send an email their way before submitting your protocol. They can tell you what level of IRB approval you need, or if

your research will require IRB approval at all. Most importantly, **you can always make arguments to the IRB for why you are doing things the way you are.** Even if you're doing something that might not appear to be best practices in research, have informal recruiting materials, or use a methodology that is more experimental, as longas your research is otherwise ethically done and you have plans to protect participants privacy, you may be able to convince the IRB that it is necessary for the research you are conducting to follow that method.

Temple IRB Minimal Risk Protocol Template

The section below uses Temple University's template as a baseline. While we use this protocol, and describe research in the context of the city of Philadelphia, these same principles should apply to other research contexts within the United States.

Abstract of the study: You have to provide a summary (recommended length: 250 words) of the study that includes:

> **Overview of study design**
> Briefly summarize the nature of your qualitative media or communication research. Is it exploratory, descriptive, comparative, or another design? What are the qualitative methods – interviews, focus groups, content analysis, ethnography, etc. – that you plan to use? Are you conducting a phenomenological study, a Grounded Theory study, a case study, etc.? Emphasize that your research is qualitative.
>
> **Population of interest**
> Identify the population from which you will be recruiting participants and describe it. Specify demographics pertinent to the study's aims, such as age range, gender, occupation, or any other traits that define the group you will be targeting. Why are these particular people of interest to you regarding the research?
>
> **Aim of research**
> Clearly indicate the primary research question or objective, encompassing what you hope to understand, explore, or uncover about the media or communication phenomena that you are investigating. Also, indicate why this is an important question; why answering it is significant in terms of contributing to existing knowledge or resolving an established problem or gap in our understanding.
>
> **Design of the study**
> Qualitative research typically does not involve experimental design, but it is still imperative to discuss how we will systematically collect and analyze our data. This includes discussing the settings or contexts in which data will be gathered, the strategy for sampling (such as purposive or snowball sampling), and the process for recruiting participants. It is also necessary to mention the methods for data collection, such as semi-structured interviews or participant observation, as well as the analytical approach, such as thematic analysis or discourse analysis. Additionally, any devices or technological applications used in the data collection process should be mentioned to address methodological and participant interaction concerns that an Institutional Review Board (IRB) may have.

Protocol Title: The protocol title is a crucial part of your application for human research, as it should provide a clear sense of what you will be studying and how. To give you an idea, here

are a few example titles that could be fitting for different kinds of qualitative research projects in media and communication studies:

- Exploring Digital Literacy Practices among High School Teachers: A Qualitative Study
- Narratives of Identity in Social Media among Immigrants: A Cross-Cultural Analysis
- User Experience and Accessibility in Mobile News Applications: A Qualitative User Study

When including the protocol title in your IRB template, make sure it matches the title used in any other documents submitted to the IRB to ensure consistency across your application materials.

Sponsor / Funding: If the project is not funded, **this section can be omitted.** If the research is funded or sponsored, clearly identify what organization, agency, or entity is providing the research sponsorship or funding for your academic work; this can range from governmental organizations to any commercial entities or any other types of private or public funders.

If appropriate, a brief note about the type of support, which can give a little context about the goal of the funding if there are multiple motivations on the funder's part - e.g. grant, fellowship, award, etc.

Example: "This research is sponsored by the National Institutes of Health (NIH), under grant number [XYZ]. The direct recipient of the funds is Temple University's Department of Communication and Social Influence."

If Temple is a sub-awardee, indicate both the originating funder (e.g., NIH) and the direct recipient (i.e., the organization providing Temple with the funding).

Originating Funder: Identify the name of the primary funding agency that has awarded the grant or funds. This is the organization that initially disseminates the funds for the research project.

Direct Recipient: Identify the organization to which the originating funder disseminates the funds and that is providing Temple University with the funding. In some cases, this could be another university, a research institution or a consortium that then allocates a portion of the funds to Temple for the specified research project.

Example: "The original funding for this project comes from the National Science Foundation (NSF), awarded to the Consortium for Media Research. Temple University is a sub-awardee of this grant, with funding provided through the consortium to support this project."

IRB Review History: If this project has not been submitted for review before **this section can be omitted.** If you **have** previous IRB review(s), you have to provide:

- Study Identification Number: Provide the unique identifier the external IRB has assigned to your study.
- IRB Name: Clearly identify the name of the IRB (institution, company or federal agency Ethics Committee) at the other institution or organization which reviewed your study.
- Date of Review: State the date(s) the external IRB reviewed your protocol. If the protocol was reviewed more than once, please state the individual review dates (Ex: Initial Review, Follow-Up, Amendments, etc.).
- IRB Contact Information: Include the contact information for the primary contact at that institution's IRB, such as the Name, Phone Number, and Email of the IRB Chair/Chairperson or Administrator for the external IRB. This information should be accurate and current and a contact who would respond.

Investigator: PI's must be eligible under Temple's Principal Investigator Policy**.** Include the principal investigator's name as listed on the Application for Human Research. For projects conducted by graduate students' the faculty advising their work should be listed as the PI (as required by the university), but any student researchers collecting data should also be included as "researchers" or "investigators."

Information to Include:

- Provide the full name of the Principal Investigator (PI) as it appears on the Application for Human Research. Ensure that the spelling is accurate and that any titles or credentials (e.g., Dr., PhD, etc.) are included if applicable.
- While not always explicitly requested, including the PI's departmental affiliation or role within the institution can be helpful for context, especially in larger institutions or if the PI has multiple roles.
- Example: Principal Investigator: Dr. 'X'; Department: Department of Communication and Social Influence, Temple University

Objectives: Describe the purpose, specific aims, or objectives. Begin by stating the overall purpose of your study. Sum up the main reason for conducting the study in a single sentence. For a qualitative study, you might write a purpose like, "The purpose of this study is to explore, understand, and describe the phenomena of [your study topic] within a specific context." Break down your overall purpose into more specific aims or objectives. This will constitute a detailed description of what you actually want to study, with clear and focused statements. Indicate what you want to learn or accomplish. Although qualitative research does not deal with hypotheses like quantitative research, here is where you should outline your research questions.

Background: Begin by summarizing relevant research in the field, focusing on studies that directly relate to your research question or objective. Highlight any limitations or gaps in the existing literature that your study aims to address. Explain the rationale behind your research, linking the identified gaps in the literature with your proposed study's objectives and research questions. This should make a clear case for why your research is necessary and how it will contribute to the field. This could include areas where the current understanding is incomplete, populations that have been under-researched, or methodologies that have not been explored.

If you have conducted preliminary research or pilot studies, summarize the key findings and how they inform the proposed study. This could include data that supports the feasibility of your research design, preliminary findings that suggest potential outcomes, or insights that have shaped your research questions or methodology.

Setting of the Human Research: Describe the sites at which your research team will recruit participants and conduct the research. Here is a structured way to approach this answer:

Identify the site(s) where your research team will identify and recruit potential subjects: Clearly state the physical location(s) or online platforms where you plan to identify and recruit participants. This may encompass universities, community centers, online forums, social media groups or other relevant settings.

Identify the site(s) where your research procedures will be performed: Provide details about the location where research activities will occur (e.g., for studies involving interviews, observations, interventions, etc., will these occur in participants' homes or offices, public space, or online environment?).

Composition and involvement of any community advisory board: If your research involves a community advisory board, describe its composition, how members were selected, and the board's role in the research process. This might include advising on recruitment strategies, ensuring cultural sensitivity, and facilitating community engagement.

Site-specific regulations or customs affecting the research for research outside the organization. This includes obtaining permissions from local authorities, respecting cultural norms, and adapting research methods as necessary.

Local scientific and ethical review structure outside the organization: Detail the local scientific and ethical review process, including how and where the research protocol will be reviewed. Mention any local IRB equivalents, ethical review committees, or other bodies that have jurisdiction over research activities in the area.

Resources Available to Conduct the Human Research

Justify the feasibility of recruiting the required number of suitable subjects: This comprehensive overview is key to demonstrating to the IRB that you have the infrastructure and plan necessary to carry out your research ethically and effectively. Articulate the size of the population from which you will be able to recruit participants. Provide further detail on how you identified this population and your access to it, be it from community networks, specific institutional affiliations, databases, or social media platforms. Calculate the percentage of the potential subjects you hope to recruit and provide a rationale for this number that is aware of the needs of your research and, if appropriate, any statistical power calculations.

Study period: Outline the projected timeframe for the study, from initiation through data collection and its analysis and reporting. That is, describe how much time you and your team can and will devote to the study, considering your other responsibilities. List key milestones. Ensure that they are reasonable in the context of the agreed study period. This should be enough to assure the IRB that the study is workable and manageable for you.

Describe the number and qualifications of your staff: If needed, list the number of individuals to be involved in this study and their roles. Specify their relevant qualifications (e.g., experience conducting research using similar methodologies or with the identified population). If applicable, describe any unique knowledge possessed by staff members of this study’s research sites (e.g., an understanding of a society or culture’s dynamics or traditions) that is not common knowledge. If relevant, explain any research experiences of team members who will be working at the specific sites. Explain how all personnel involved in the execution of the study will be made aware of the protocol and any ethical concerns related to their involvement in the study. This could include formal training sessions, weekly team meetings, or reviewing the study materials with your team in a regular research meeting. Explain the ongoing project support and supervision mechanism to be headed by the principal investigator or another senior member of the research team, who will be available to handle any queries arising during the normal conduct of the study.

Describe your facilities: Provide details on the office spaces, participant interaction locations, and data storage facilities at the research sites. Explain any relevant features

in these facilities that are relevant to the protection of participant privacy and data security.

Prior Approvals

Describe any approvals that will be obtained prior to commencing the research. (e.g., school, external site or funding agency).

Study Design

Recruitment Methods: Describe materials that will be used to recruit subjects. Include copies of these documents with the application. Include a copy of recruitment materials; advertising, like flyers and newspaper ads, and scripts for broadcast ads should be sent to the IRB to ensure that wording is appropriate.

Inclusion and Exclusion Criteria: Describe the criteria that define who will be included or excluded in your final study sample, and how you will determine if people fit the inclusion/exclusion criteria. If people are excluded after providing initial data, explain what will happen to that data. Be sure to describe any vulnerable populations that you are including in your study from the IRBs list: Adults unable to consent, individuals who are not yet adults (infants, children, teenagers), Pregnant women, Prisoners, and Individuals who do not understand English.

Local Number of Subjects: Indicate the total number to be recruited locally, distinguishing between those screened and those expected to complete the study.

Study-Wide Number of Subjects: For multi-sited studies, provide the total number of subjects to be recruited across all sites.

Study Timelines: Detail the duration of participation for subjects, the time frame for enrolling all subjects, and the anticipated completion date of the study.

Study Endpoints: In a qualitative research, study endpoints may not be about measurable outcomes, but about understanding phenomena, experiences, or behavior from the point of view of the participants. Endpoints may be themes, patterns, or concepts that emerge from data like interviews, focus groups, or observations. While these endpoints are not quantified, they are critically analyzed to lend depth and context to the research question.

Procedures Involved in the Human Research: This section should provide a detailed description of the study procedures, what data will be collected, and how the data will be analyzed. All surveys, interview scripts, and data collection forms should be included as well.

Data Management: This includes the outline of the data analysis plan along with security measures for data protection (e.g., encryption, access control), quality control procedures, details of data storage and data handling protocols throughout the study. Note that subject confidentiality and anonymity will also be protected.

Withdrawal of Subjects: Discuss what happens with a participant decides to withdraw from a study and the circumstances under which the subject's participation in the

research may be terminated without regard to the subject's consent and such other conditions under which the investigator may terminate the subject's participation in the research.

Risks to Subjects: List any foreseeable physical, psychological, social, legal, or economic risks participation in this research could lead to and how you plan to mitigate those risks. These risks are explained below:

Physical Risks: Include potential physical harm or discomfort that could arise through participation, and how they will be avoided.
Psychological Risks: Contemplate potential psychological impacts such as stress, anxiety or emotional distress, and how they will be avoided or mititgated.
Social and Legal Risks: Evaluate risks associated with privacy breaches, stigma or discrimination that may be tied to participation. This includes potential impacts on social relationships, employment and legal standing. Specify steps to protect privacy and minimize these risks.
Economic Risks: Describe any economic risks to participants and consider how these will be managed or reimbursed.

Acknowledge that some risks might not be foreseeable. Consider potential risks to individuals who are not direct subjects of the research but who may be affected by the research or its conduct or outcomes. These could include family members, communities or particular populations. Include any of these risks and how they will be managed.

Potential Benefits to Subjects: Describe the benefits, or indicate no benefits, directly to the individual subjects (not the society) for participating in the research.

Privacy and Confidentiality: This section is only required for studies collecting Protected Health Information and subject to HIPAA regulations.

Economic Burden to Subjects: Describe any economic burdens to participants -- e.g. travel expenses, time off work or other costs -- and consider how these will be managed or reimbursed.

Subject Compensation: Describe the amount, form, and timing of any payments to subjects, how information will be collected for reimbursement (e.g., email address), and any stipulations to the payments (e.g., failure to complete the whole session) that may result in participants not being compensated..

Consent Process: Indicate whether the research team will follow the informed consent model listed here, for Temple University "INVESTIGATOR GUIDANCE: Informed Consent (HRP-802)." If not, provide a detailed description of the consent process. If you are included any vulnerable populations that required unique consent processes, per IRB guidelines, detail those procedures.

Process to Document Consent in Writing: Written documentation of consent will be waived if the research poses no more than minimal risk of harm to subjects and does not involve anything for which consent is expected outside of a research context. Review IRB protocols for most recent guidance.

Vulnerable Populations: Review the IRB list of vulnerable populations, and indicate if any will be included in this project and what will be done to ensure their welfare and rights are protected.

Multi-Site Human Research: If applicable, for multi-site study where the researcher is the lead investigator, describe the processes to ensure communication among sites (e.g., the most current version of the protocol, consent document, all required approvals, all amendments, data protection as per local policy, etc.). Describe the method for communicating problems, interim results, and the closure of a study.

Sharing of Results or Incidental Findings with Subjects: Describe whether study results will be shared with subjects, and if so, describe how it will be shared.

Research Conducted in a Foreign Country: Any project that will be conducted in whole, or in part, at a location outside the United States must include:

- The study location and the primary language/dialect spoken by the proposed subject population.
- The detailed information and contacts of the local IRB or ethics committee (if being reviewed) at the foreign research site.
- The detailed information and contacts of any foreign investigator (if applicable).
- Knowledge of the proposed subject population (e.g., local customs, practices, and religions, etc.).
- Researchers' proficiency with the local language, or how communication will be translated.
- How to notify and disseminate the project results to the foreign community.
- Any cultural, regional, or unique risks the IRB should be aware of.
- How researchers will communicate with the IRB to report any problems or amendments.
- How the faculty sponsor will oversee the study while student researchers are conducting the research in the foreign country.

Community-Based Participatory Research: Describe how the community will be involved in the design and conduct of the research, and the dissemination of results once the study is concluded. Learn more about community-based participatory research here: Community-Based Participatory Research Program (CBPR) (National Institute on Minority Health and Health Disparities, 2024).

Research Ethics and Media/Communication Professional Organizations

These are the ethical guidelines relevant to specifically to research from major media and communication professional organizations.

Diverse/Inclusive Research Practices

Embracing diversity is a fundamental ethic shared across all academic organizations. The International Communication Association (ICA, 2019) advocates for the principles of non-discrimination and deep respect for human diversity. Researchers are called upon to embody these values, ensuring that their work is inclusive of and accessible to diverse populations. Inclusivity in research involves creating study designs and conducting research in ways that are

accessible and respectful to participants from diverse backgrounds. This means considering the unique perspectives and experiences of all participants and ensuring that research practices do not create or perpetuate an environment that is intimidating, hostile, degrading, humiliating, or offensive.

Association for Education in Journalism and Mass Communication (AEJMC, 2008) members are encouraged to ensure that these aspects of inclusivity are integrated into academic curricula and are considered in the hiring processes within institutions. It is important to represent the contributions of women and minority groups in educational content, and to actively include those who have historically been marginalized from public communication due to limited opportunities. AEJMC (2008) should recognize and, where feasible, reward divisions and interest groups that achieve significant progress in embracing inclusivity across these dimensions. AEJMC (2008) should seek partnerships with media organizations that advocate for diversity and participate actively in regional and national conversations on this subject.

Within the National Communication Association (NCA, 1999), researchers are encouraged to respect and honor culturally-based differences in communication and presentation styles, both within and outside the classroom. This involves creating a supportive atmosphere that encourages students to utilize multiple communication methods, tailored to suit the specific context and goals, thereby enriching the educational experience through diversity. Ensure equitable treatment of all students, consciously avoiding the influence of personal biases in teaching and interactions. In scholarly publishing, editors and planners bear the responsibility of assembling editorial and review teams with a focus on scholarly acumen and openness to diverse methodologies, topics, and theoretical perspectives. This includes selecting associate editors and manuscript reviewers who not only bring scholarly expertise but also represent a variety of geographic regions, genders, ethnicities, and cultural backgrounds, ensuring the review process is fair and inclusive.

Respect for different identities

ICA (2019) researchers are encouraged to treat everyone with professionalism, civility, and respect, irrespective of differences such as gender, sexuality, race, ethnicity, religious affiliation, ability, age, marital, domestic, or parental status, gender identity or expression, caste, social class, nationality, or immigration status.

AEJMC (2008) members are dedicated to fostering an environment of respect and integrity, recognizing and valuing the diverse identities and experiences of research participants. This commitment involves treating all individuals with fairness, regardless of their age, race, ethnicity, socio-economic status, gender, religion, culture, sexual orientation, or any other identity markers.

Greater Good

ICA, NCA, and AEJMC offer Ethical guidelines for communication research to prioritize the greater good, which includes Social Responsibility, Public Good, and Open and Free Scholarly Exchange. The following summary highlights the ethical principles and values guiding communication research and practice in these professional organizations.

> **Social Responsibility:** ICA (2019) recognizes social responsibility to enhance the public good, encompassing scholarship, research, teaching, and the potential impact of our work on organizations, industries, and politics, i.e., researchers have a responsibility

to ensure that their efforts respect human diversity, are used in socially responsible ways, meet social needs, and are broadly accessible. ICA (2019) affirms its commitment to the United Nations Universal Declaration of Human Rights and its ethical principles regarding “the freedom, self-determination, and privacy of all humans, regardless of gender; sexuality; race; ethnicity; religious affiliation; ability; status; age; marital, domestic, or parental status; gender identity or expression; caste; social class; nationality; or immigration status” (ICA Code of Ethics, 2019). Similarly AEJMC (2021) asserts that researchers must treat all participants with respect, fairness, and integrity, regardless of age, race, ethnicity, socioeconomic status, gender, religion, culture, or sexual orientation (AEJMC, 2021).The rights of the research participants must be protected when data is collected and personal information should be collected only for legitimate purposes. Similarly, the research should address the needs of vulnerable populations, such as refugees, and children. It includes conducting research that addresses significant social issues, respects the rights and dignity of research participants, and promotes understanding and positive social change. In other words, researchers need to consider the potential impact of their work on society and engage in research that contributes to the greater good.

Public Good/Benefits from Research: Public good refers to the outcomes or benefits of research that contribute to the well-being or advancement of society. ICA (2019) emphasizes the responsibility to ensure that the results of members' efforts respect human diversity, are used in socially responsible ways, meet social needs, and are broadly accessible. NCA (1999) condemns research that degrades individuals and humanity through distortion, intimidation, coercion, violence, and the expression of intolerance and hatred. Actions that may cause harm include disclosing information that the researcher has promised will remain confidential; failing to secure informed consent from participants in experimental studies; failing to debrief participants after an experiment; failing to disclose in advance that participants will be observed or taped; failing to warn participants in advance that they will be queried about sexually explicit or illegal behavior (AEJMC, 2021).

Open and Free Scholarly Exchange: Open and free exchange pertains to academic freedom, transparency, and collaboration in sharing scholarly knowledge and research findings. Ethical values are upheld through constant reflection, debate, engagement, and dialogue in our communication scholarship, research, and teaching (ICA, 2019). It is necessary to promote accessibility to communication resources and opportunities to realize human potential and contribute to the well-being of individuals, families, communities, and society (NCA, 1999). ICA, NCA, and AEJMC encourage researchers to contribute to the collective advancement of knowledge by sharing their findings and engaging in dialogue with other scholars within and outside their organizations. The researcher should take into consideration and respect the wishes of the research participants and other members of the scholarly community regarding the publicness of the research and wishes regarding publishing. The researcher should maintain a professional tone when discussing the research in public (ICA Code of Ethics, 2019).

Fidelity/Honesty

Ethical considerations for professional organizations also includes expectations for researcehr honesty in their work and professional interactions. This includes:

Avoiding plagiarism: When conducting and publishing research, it is important that researchers do not take credit for someone else's work, regardless of whether that work has been published or not. In addition, researchers should take care to "accurately and fully document sources for ideas, words, and pictures" (AEJMC, 2008). To avoid plagiarism concerns, researchers should always properly cite others' works when using ideas from an existing source (ICA, 2019).

Honest Authorship Attribution: According to the AEJMC's Code of Ethics (2008), an author is defined as anybody "involved in conceiving, designing, conducting, and writing a research study." The first author shoulders the main responsibilities of the study, while co-authors are typically contributors who are less involved than the first author. Authors should be listed in order of the most contributing author to the least contributing author. In the case where none of the authors involved is designated as the "primary" and the contributions of all authors involved were equal, authors can choose how to display names on the study: alphabetically, randomly, or some other way. ICA (2019) adds, "All submissions to ICA conference and journals are to contain clear and accurate attribution of authorship. The contributions of students, associates, and researchers should be honestly attributed. For all research presented at ICA conferences or published in ICA journals, all authors that contributed to the work should be fairly acknowledged and the published author list should accurately reflect individual contributions."

Conflict of Interest (Funding): According to the AEJMC's Code of Ethics (2008), "Research studies must be designed free of conflict of interest; studies tailored to produce an outcome consistent with the interests of a funding sponsor, institution, or research agenda are in breach of ethical research standards."

Professional Relationships: When faculty conduct research with the help of students, it is important to consider the power dynamics that may be present. While it is possible for faculty to be mentors, guides, and even friends to students, it is important to remember the impact of each individual's role. Faculty and students must be honest with each other when working together. It is also the faculty member's responsibility to take into consideration each student's individual needs when mentoring (NCA, 1999). Furthermore, according to the AEJMC Code of Ethics (2008), "Faculty should never pressure graduate students for co-author credit and graduate students should always acknowledge the contributions of faculty advisors to their scholarly publications."

Fair Use: According to ICA (2019), fair use is defined as "the right to use copyrighted material without permission or compensation where the social and cultural benefits are greater than the costs to the copyright holder." Fair use of copyrighted material is important for communication research, but it falls to the researcher to clearly attribute any copyrighted works used.

Fraud: Researchers should not commit fraud. This includes fabricating data or concealing data (AEJMC, 2008).

Independent Review: The independent review process is expected to be confidential. Authors' work should be evaluated on its own merit. In addition, reviewers should not use ideas or material from an unpublished work they review to advance their own research goals (AEJMC, 2008).

Unique Considerations in Digital Spaces

The Association of Internet Researchers' (AoIR) has developed a set of Internet Research Ethics (IRE) that has adapted and changed over the years. The first version of the guidelines waw published in 2002, updated in 2012, and the most recent version was adopted in 2020 (franzke et al., 2020). The following sections are adapted from the 2020 Ethical Guidelines, but scholars doing internet research are encouraged to read the earlier versions as they are designed to build upon one another:

Basic Ethical Approach

The **basic ethical approach** of the IRE is what the franzke et al., (2020) calls a "process approach," or an approach wherein guidelines are developed "from the bottom up in a case-by case based approach without making a priori judgements whether some research per se is unethical" ((franzke et al., 2020), p. 4). Working from the bottom up means that there is an increased focus on the daily processes and practices of researchers. The process approach is "reflective and dialogical" (franzke et al., 2020), p. 4) and begins with an evaluation of one's own research. The process approach is ongoing and, like the guidelines developed like AoIR, constantly changing to reflect the accumulating experience of researchers and to address new concerns. Ethics and methods are closely intertwined; the methods a researcher chooses will pose particular ethical challenges, and those ethical challenges should, in turn, also shape what methods a researcher pursues. Just as methods may shift over the course of a project, so too do ethical concerns and assumptions; thus, ethics is something to which researchers should be paying constant attention.

Ethical Pluralism & Cross Cultural-Awareness

AoIR is a proponent of both ethical pluralism and cross-cultural awareness. Awareness of other cultures is very important to researchers doing work on other cultures (as obvious as that may seem!).

> **Ethical Frameworks**: Different geographic locations have different approaches to ethical frameworks, including deontological frameworks that prioritize the protection of the basic human rights within the context of democratic societies (Europe & Scandinavia); utilitarian frameworks that prioritize the greater good of the collective rather than participants (United Kingdom and United States). Also important to consider are frameworks rooted in the experience of minoritized communities, like feminist or anti-colonial frames (franzke et al., 2020).
>
> **The Self:** Generally, the "West" views human beings as individuals and moral agents; the basis for ethical frameworks, then, is highly individualized. Alternatively, other geographical areas prioritize the self as it connects to others, including family, their

community, and even “natural and ‘supernatural’ orders” (franzke et al., 2020, p. 6). Of course, these ideas about the self are constantly evolving.

Ethical Pluralism: Ethical pluralism’s answer to different ethical practices is to frame them as “diverse interpretations, applications, or understanding of a shared norm” (franzke et al., 2020, p. 6). Ethical pluralism recognizes the validity of local norms but also connects them to broader or shared norms. This is not to be confused with ethical relativism.

Guidelines, Not Recipes: Ethical pluralism translates into the practice of making judgment calls on a case-by-case basis rather than attempting to fit all ethical and legal requirements into a single box. That is, there are guidelines, but there are no rules that apply perfectly to all projects: as the franzke et al., (2020) emphasizes, “Ambiguity, uncertainty, and disagreement are inevitable” (p. 6).

Asking the Right Questions’s

The AoIR’s ethical guidelines prioritize asking relevant questions that will help researchers better understand what ethical issues they are grappling with as well as encourage dialogic reflection which in turn leads to individual and collective judgment calls:

An example of some of the questions from the first iteration of the AoIR’s guidelines:

- Venue/environment - expectations -authors/subjects - informed consent. Where does the inter/action, communication, etc. under study take place? What ethical expectations are established by the venue?
- Initial ethical and legal considerations - How far do extant legal requirements and ethical guidelines in your discipline “cover” the research? How far do extant legal requirements and ethical guidelines in the countries implicated in the research apply? (franzke et al., 2020, p. 7)

These questions have changed, especially since Web 2.0 emerged, along with social networking sites and sites like Youtube that heavily showcase content generated by users. Privacy is a much bigger concern, for example.

The questions added to the second edition of these ethical guidelines focused on understanding informed consent “as a primary way of protecting the deontological norms of autonomy and equality” (franzke et al., 2020, p. 8). Other questions asked researchers to consider different elements of Big Data research, and to also look forward and think about the potential challenges that may arise due to the development of more advanced technology.

Stages of Research

IRE 3.0 expands the stages of research from IRE 2.0 to include considerations that arise from Big Data research and larger scale research projects. The stages outlined in IRE 3.0 include:

- **Initial research design** - considering ethical issues, going for grant funding
- **Initial research processes** - gathering data, storing data, identifying data, etc.
- **Analyses** - thinking about how different "techniques formulas, or instruments may re-identify data through aggregation of multiple data sets. This includes considering downstream ethical effects arising from the unpredictability of now-common analytical processes, often algorithmically driven" (franzke et al., 2020, p. 9).
- **Dissemination** - sharing research and data with the public (conferences, journals, etc)
- **Close of project** - destroying research data or other confidential materials

Obviously, these stages are not necessarily linear, or may come in different forms, but ethical concerns should be something to consider throughout the entire process.

Informed Consent

Informed consent is a big concern for those conducting Big Data projects, utilizing scraping methods, or using API. As more and more sensitive information is gathered, researchers must protect the identity of participants and obtain informed consent–however, this is not necessarily possible with projects that use Big Data. Researchers have responded in different ways: getting first-degree informed consent, deleting names or identifying information, using pseudonyms, and paying special attention to and finding justifications for questions that rely upon sensitive data. Alternatively, some researchers may try to gain informed consent from specific people within their study during the dissemination stage of the research process. Getting quotes from a few participants is not as difficult as, say, getting the informed consent of 100.

Protecting the Researcher

It is becoming clearer and clearer that protecting the researcher is also a major concern. IRE 3.0 mentions GamerGate and other events where academic researchers are subjected to harassment (death threats, doxxing, etc) for either their work or their public identity or both. Conducting research on extremist movements increases the risk to researchers both physically and mentally. Researchers may suffer psychologically and therefore get treatment, which makes it even more important for IRE 3.0 to focus upon this topic. Institutions must also develop stronger policies to protect researchers who are being harassed.

Additional Topics

> **Quality of Research Questions:** It is very important to develop research questions since the development of quality research questions will help the researcher better understand the ways in which methods and ethics are intertwined within the project.

Research questions should be designed so that no more private information than is strictly necessary is collected.

Power & Power Imbalances: Researchers need to be careful when collecting data from social media so that they may preserve the privacy and dignity of their participants. Researchers need to be mindful of the broader infrastructures that house this information (understanding how the architecture of a social media site works) so that they can be as considerate as possible.

Related Guidelines

AoIR suggests looking to other guidelines in addition to IRE 3.0, like The [Norwegian] National Committee for Research Ethics in the Social Sciences and the Humanities' (2020) A Guide to Internet Research Ethics. Other potential guidelines include the The Canadian Tri-Council Policy Statement: Ethical Conduct for Research Involving Humans (2014) and the U.S. National Science Foundation and the Office for Human Research Protection. Other ethical guidelines of other organizations like ICA are also helpful.

Changes to US Common Rule: As of 2018, "scholarly and journalistic activities such as oral history, journalism, biography, literary criticism, and legal research [are not considered to be research] and so are exempt from its requirements for informed consent and related protections, as well as how Institutional Review Boards (IRBs) are to be constituted and function" (franzke et al., 2020), p. 13). While this is only the case in the US as of the franzke et al. (2020) guidelines, other countries tend to look to the US as a model and so it will have significant impacts beyond just the US. One of the biggest issues is that, in general, IRBs in the US are "hyperconservative" (franzke et al., 2020), p. 13). IRB boards may be overtly cautious. This is partially why the various iterations of IRE have been created.

Legal Aspects: Both national and international laws act as the framework for the IRE, especially when it comes to privacy. IRE 3.0 urges researchers to pay special attention to General Data Protection Regulation (GDPR) as it relates to copyright. More research on the GDPR for IRE is being conducted. Terms and Conditions are also important. The terms and conditions for Twitter, for example, "suggest that researchers relying on Twitter-based datasets must continually check if any tweets have been deleted from the platform, and then remove them for their research dataset accordingly" (franzke et al., 2020, p. 14). Please note that this was released before Twitter became X, and so the policies may have changed. Research may very well violate terms and conditions of any website–researchers cannot scrape Facebook or LinkedIn, for example. Using multiple accounts for research may violate these terms. It is a bit of a gray area as to whether researchers who do work on behalf of the greater good **must** follow a site's terms and conditions. Thankfully, tools are available that will let researchers know if data has been deleted and therefore it can be deleted from their research.

Venues and Platforms: A lot depends upon which platform one is conducting their research. Different companies have different terms and conditions. Pay attention to the rules of the different platforms.

Cultural Dimensions: Since the world wide web is just that–world wide–the Internet crosses "multiple cultural boundaries, thereby implicating multiple local cultural norms, practices, beliefs, etc. – both in terms of local uses, approaches, etc. and local research ethics" (franzke et al., 2020), p. 15). As a result of crossing all of these boundaries, there are inevitably differences in how researchers view their work, harking back to the difference between conceptions of the individualized person in "Western" societies and the more communal, relational conception of a person in others. Researchers should be mindful that "pluralistic" solutions can be found that reconcile the differences between different philosophies–for example, Confucians believe in a real self, much as those in the "West" do (franzke et al., 2020, p. 2015). These plural solutions can overcome even bigger differences in philosophy–for example, Thai researchers may view society as more collective and therefore not see the same value in obtaining individual informed consent, but such rules and regulations do operate within this context.

Other concerns may manifest when researchers are doing research on participants who may be harming their own well being (ex. suicidal participants or a study on self harm). Similarly, researchers may stumble across information that is relevant to criminal cases. As franzke et al. (2020) note, there is often a professional and/or legal obligation for researchers to report such information to the relevant authorities: but this varies widely depending on local and national legislation, specific professional ethical guidelines, and/or specific policies that may apply within a given research context (p. 17). Additionally, issues have arisen (and will continue to develop) with the rapid advancement of artificial intelligence (AI). There is an expanding body of literature on the rights of robots and AI as well as the moral and ethical repercussions of inflicting harm on "virtual agents" (franzke et al., 2020, p. 18). franzke et al. (2020) encourage researchers to look towards those who study Human-Machine Communication (HMC) for how to best treat all individuals involved in their research (even virtual ones) with respect.

Algorithms & Learning Models: When looking at big data and learning methods, there are several major issues to consider: How can researchers ensure that subjects are adequately represented? How does one classify their data subjects by categories like gender? How is data cleaned? How can the research be accessible to the broader public, especially the group being studied? This is really important considering the rampant nature of misinformation. Learning models are either supervised (controlled or semi-controlled models that the researcher feeds information to) or unsupervised (these models find patterns in data on their own). The ethical considerations of using such technology are behind the research being done using learning models. Other internet researchers study closed algorithms by seeing how they handle data disclosure, if they enable systemic oppression, or if they influence matters of great public importance. Such

algorithms are usually protected by intellectual property rights, and so “researchers may find themselves in an ethical dilemma in wanting to disclose societal problems on the one side, and needing to protect themselves against lawsuits and platform identity ‘attacks’” (franzke et al., 2020, p. 21). This may be easier if researchers collaborate.

Companion Resources: Topical Guidelines & Ethical Frameworks

Within its main document presenting guidelines for ethical consideration when conducting internet research, the Association of Internet Researchers (AoIR) offers companion resources and appendices to address ethical practices when working with human subject data in the domains of artificial intelligence and machine learning, operational security, corporate data, and feminist research.

Artificial Intelligence and Machine Learning: Social science or humanities internet researchers that focus on the usage of artificial intelligence tools may encounter moral dilemmas at various stages of their project. To work responsibly and avoid harm, it is important for internet researchers to assess their approach at every phase of their project. Justification regarding specific decisions or a chosen method should be provided to protect the privacy and autonomy of all participants involved and create trust in the final project.

Relevant considerations for researchers and reviewers:

- Directly state and limit the scope, aim, purpose of the project
- Scrutinize the chosen technology used and its social, political, and economic context
- Decide which features to use and how the data will be stored, managed, and protected
- Document all actions taken and decision enacted throughout the project (Bechmann, 2020)

Corporate Data: Partnering with corporations for research or interacting with corporate data can be useful for knowledge transfer and presents opportunities for academics to expand their research into new horizons. However, disingenuous sources of corporate funding and blurry policies surrounding proprietary data access risk altering the research objective which may pose ethical concerns. In social media research, the researcher must carefully evaluate the nature of online data and minimize the amount of data obtained to ensure anonymity. Relevant ethical questions should be asked during the research process to maintain independence leading to a fair and desirable outcome for the researcher and corporation.

Ethical questions to address:

- Who are the stakeholders involved?
- Who is the subject that is providing financial support?
- Who decides the methodological approach(es)?
- Who is the owner of the data obtained during the research process?
- Which are the terms of use of the platform studied? (Locatelli, 2020)

Operational Security: Regarding overall safety and security when conducting internet research, researchers should be knowledgeable of and abide by the “network usage policies” designated by the information technology (IT) security team of their research institution, who have the responsibility to protect personnel and equipment. The impact of online research extends beyond any specific project and security policies have been designed to protect the researchers and their reputation, the institution and its integrity, and the hardware and software technology belonging to the organization (Douglas, 2020).

Feminist Research: Feminist research interests examine the effects that gender has in social, political, and economic areas and may focus on social media data, blog posts, video games, and fandom. The relationships that exist amongst the project participants and communities of interest must be examined for ethical impact factors to avoid harm.

Principles for a feminist ethics of care:

- Examine the project and describe the relationships between the research stakeholders
- Exhibit care and ensure the subject community is being consulted and respected
- Observe the relationships that extend beyond the project’s subjects into the wider research community (franzke, 2020)

The supplemental guidelines and suggestions summarized in the specific domains of reference above are provided by AoIR as a starting guide to lay the groundwork for further ethical analysis. The intention is to prompt the internet researcher to reflect upon the challenges that may arise during a project and examine the four levels of analysis within the provided “impact model” for ethical assessment which includes level 1 - treatment of people, level 2 - side effects, level 3 - use of data, and level 4 - future-making (Markham, 2020). Proceeding with caution and concern when interacting with human subject data and asking appropriate questions will empower the internet researcher to make the best moral decision possible.

Concluding Remarks on IRE 3.0

IRE 3.0 aims to highlight the ethical challenges that arise at different points in the research process. The above is supposed to be a general structure for ethical analysis. While there are no easy answers, IRE 3.0 offers a place from which researchers may continue the “necessary ‘processes of deliberation’ to empower ethically informed research practices” (franzke et al., 2020, p. 23). Since the ethical concerns of the researcher emerge in a reflective, dialogical process, the judgements made by researchers will often be “relational and intersubjective” (franzke et al., 2020, p. 23). As a result, the process must constantly be reevaluated, critiqued, and collaboratively shaped into the best possible form it can take. Having conversations and discussions and not merely going with the primary researchers’ instincts is important.

Researchers MUST consider ethical judgements. Ethics are not merely for philosophers.

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Chapter 3: Research-related Software

Citation Management Systems

Zotero

What is Zotero?

Zotero is a computer-based reference management software utility that enables users to create a personal library database of their research sources and materials. It allows users to locate, store, annotate, organize, update, add tags, and cite their reference materials directly within the platform and offers cloud storage functionality for data backup and collaborative sharing. Zotero is powerful for its cross-platform and synchronization features. Zotero can be used in an internet browser to keep track of potential citations and can also be integrated into Microsoft Word. Now, with the newly updated built-in PDF reader, users can read and mark up text with highlights, notes and annotations. Zotero generates in-text citations and bibliographies in multiple different citation styles.

Key Features of Zotero for Media and Communication Researchers

Zotero simplifies collecting and organizing information for media and communication research. Its features are numerous and include an active Zotero citation add-on, browser integration (with word processors and writing platforms), a built-in PDF reader with note-taking capabilities, and the ability to collaborate with others online. Zotero supports various citation styles and enables collaboration on online projects. You can work with others on shared libraries, projects, and files. It allows you to collect and organize different types of online or offline resources. The folder system and tagging abilities make it easy to organize resources, and its integration with writing platforms enhances research efficiency. Zotero also offers customizable citation styles, cloud syncing, export capabilities, and overall enhances the research process. Overall, Zotero is a highly useful tool for researchers in the field of media and communication.

Here is a list of useful key features:

- Active Zotero citation add-on and browser integration (including screenshots)
- Integration with word processors, such as writing platforms
- Built-in PDF reader with note-taking capabilities
- Collaboration features for managing files, creating groups, and sharing citations with authors online
- Support for various citation styles and enabling collaboration on online projects
- Collaborative work through shared libraries, including projects and files (individually or in teams)
- Collection and organization of different types of resources (both offline and online)
- Folder system and tagging abilities to organize resources efficiently
- Integration with writing platforms to enhance research efficiency
- Reference management with customizable citation styles
- Cloud syncing and export capabilities
- Notification for retracted items

Reviews of Zotero 9 Video Tutorials

General Overviews of Zotero

How To Use Zotero The Right Way In 2023: This 13-minute video by Academic English Now provides a step-by-step guide on using Zotero. It covers aspects like downloading the software, organizing references, and using Zotero for citation management. Key skills one can learn from this video include batch downloading references, editing reference details, customizing citation styles, and troubleshooting common issues.

Reading, Annotating, Note-taking, and Drafting/Outlining with Zotero 6: This 20-minute video from the Digital Media Commons at Rice University walks users through how to read and annotate papers in Zotero's built-in PDF reader. It also discusses how to format notes and customize stand-alone notes across multiple papers, as well as individual notes for outlining purposes. The video's narrator has an accent but speaks clearly, is easy to follow, and maintains a good pace. The auto-generated captions are generally accurate.

Zotero for Mac - Google Docs: This 7-minute video by Pace University Library includes a clear walkthrough of initial start-up directions, as well as how to generate a bibliography in Google Docs. The auto-generated captions are generally accurate, but are easier to follow along with the visuals on-screen.

Zotero 6 Quick Pc 20 Min Tutorial :This 20-minute video by Xandru Tait, aimed at beginners to Zotero, covers installing Zotero, organizing folders, sourcing information, annotating PDFs, creating a citation list, highlighting online articles and turning them into annotations. The video is easy to follow and has a table of contents to easily access particular skills, with fine closed-captioning and necessary visual elements.

Managing Your References Using Zotero: This 54-minute video (with chapter markers) by University of Manitoba Libraries for students, researchers and educators is conversational in nature. The video covers many topics such as: Zotero cost and storage tips, how to get organized, adding folder, collection and subcollection, groups and sharing, setting up a group, adding members to your group, notes and tags, creating an account in Zotero and downloading software, exporting from database, using the Zotero connector, drag and drop PDFs into Zotero, magic wand tool for DOI, PMID, ISBN, arXiv ID and ADS bibcodes, finding available PDF & library lookup,inserting citations into papers and creating a bibliography. Overall, the video provides step-by-step guidance on using Zotero's features with accurate captions to understand the features described by the instructor.

Skill-Specific Zotero Tutorials

Effortlessly Take Notes in Zotero and Import Them Directly into Microsoft Word : This 3-minute video by Ammar, aimed at more advanced users of Zotero, covers how to import notes from Zotero into Word. The video has easy-to-follow steps, accurate closed-captioning, and is clear even when listened to purely through audio.

Adding Websites to Zotero: This 10-minute video from the University of Missouri Libraries is designed for beginners to Zotero. It covers how to add websites to Zotero libraries, including changing item types and entering the proper metadata. However, the video is occasionally difficult to follow, lacks closed captions, and is missing some necessary visual elements.

Zotero Tutorial: Read, Annotate and Highlight Research in the Zotero 6 PDF Reader :This 4-minute video from Research Coach Academy, designed for beginners to Zotero, covers the PDF reader feature. It is easy to follow, features accurate closed captioning through YouTube, and can be understood without visuals.

How to add folders, sub folders in ZOTERO: This 5-minute video by Dr. Sarveshwar Inani, designed for beginners to Zotero, covers how to add web links, files, reference styles, and edit citations. It is easy to follow but has incorrect closed captioning and includes important visual elements.

Software for Qualitative Data Analysis (QDA)

Qualitative Data Analysis (QDA) is a way of systematically examining and interpreting non-numerical data in order to uncover underlying meaning, patterns, and trends within the information. It can be a complex process to thoroughly extract meaningful insights from non-numeric data sources such as text, audio and video (Dubey, 2023, December 5). QDA is essential for researchers trying to make sense of human stories, personal narratives, and the complex texture of human experience and perception (Dye, 2023, December 11). There are various tools and software that focus on qualitative data analysis, which can assist in the management, transcription, organization, coding, analysis, and visualization of the data to create insights.

Why Use a Qualitative Data Analysis (QDA) Tool?

The use of Computer-Assisted Qualitative Data Analysis Software (CAQDAS) in qualitative research has proliferated over the last three decades across many fields, from the social sciences to the humanities, business, and the arts (Banner & Albarran, 2009; Cope, 2014; Woods et al., 2016). A QDA tool is an essential asset in various research and analytical projects due to its multi-faceted approach to handling and understanding complex data sets. For example, it allows for the coding and analysis of data, as the codebook and similar annotations enable the linking and identification of patterns.

There are various types of data coding software, but in general, the manual approach is more time-consuming and less satisfactory in comparison to the automated one in terms of any form of coding or content analysis. QDA tools are increasingly perceived as essential for conducting qualitative research, with researchers being strongly advised to adopt these applications to enhance their research quality (Brandão & Costa, 2020; Niedbalski & Ślęzak, 2022).

Comparison of Qualitative Data Analysis Software

	QualCoder	Taguette Coder	NVivo	ATLAS.ti	Dedoose
Cost and website	Free and open-source https://github.com/ccbogel/QualCoder/releases	Free and open-source https://taguette.org	Commercial https://www.qsrinternational.com/nvivo/home	Commercial https://atlasti.com	Commercial https://www.dedoose.com
Operating system	Windows, macOS, and Linux	Windows, macOS, Linux, and web	Windows, macOS version is limited	Windows, macOS, and web	Windows, macOS, Linux, and web
File formats	Text/PDF, graphic, multimedia, surveys	Text/PDF only	Text/PDF, graphic, multimedia, social media, bibliographic, surveys	Text/PDF, graphic, multimedia, social media, surveys, bibliographi, geodoc	Text/PDF, graphic, multimedia, surveys/spreadsheet
Coding	Coding hierarchy, autocode, auto-assign text to case	Simple coding hierarchy	Autocode to speaker, theme, sentiment and pattern, coding hierarchy	Autocode, focus group coding, code co-occurrence	Coding hierarchy, coding weights, uncoded excerpts
Searching	Advance search, SQL querying	None	Advanced search/query	Advanced search and powerful filtering options	Simple search
Reporting & Segmentation	Several report formats, cases, attributes to subset data	Code report	Sets and folders, several report formats	Several report formats, document, code & other groups to subset data	Filters codes, cases and attributes/fields to subset data
Analysis & Visualization	Many chart types, network maps, word clouds	None	Crosstabs & matrices, sociograms (networks), word cloud/tree	Network maps, word clouds, some charts, AI-based analyses	Statistical analysis, bubble plots, 2D & 3D word clouds
Collaboration	Used by one person at a time, no real-time collaboration or file merging, Coder comparison report and statistic	Add collaborators and do real-time work on a server or self-hosted option	Merge multiple users' project files, calculates interrater reliability	Merge multiple users' Desktop files, real-time collaboration on Web, interrater reliability. 23 Beta: encrypted cloud sync	Team members can collaborate on one project in real time. Calculates interrater reliability

Source: Castello, n.d.: https://guides.temple.edu/qda/choosing

Other QDA Software: In the realm of qualitative research, one may find other Computer Assisted Qualitative Data Analysis Software (CAQDAS), such as:

- **HyperRESEARCH:** It provides full access and control, including keyword coding, mind-mapping tools, theory development, and many other features. https://www.researchware.com/products/hyperresearch

- **Delve:** The text data coding software is available by monthly subscription with a 14-day free trial. https://delvetool.com/

- **MAXQDA:** The comprehensive QDA software for Windows and Mac offers a 14-day free trial as well as student discounts. https://www.maxqda.com/

- **Quirkos:** It is another example of data analysis software where computers are used as a method of analysis. https://www.quirkos.com/

- **QDA Miner:** This software is available for analyzing text as well as images on Windows and newer Macs and offers a 14-day free trial and free lite version. https://provalisresearch.com/products/qualitative-data-analysis-software/

- **WebQDA:** It represents another type of software that uses data analysis online, which could be used as a tool in a collaborative project. https://www.webqda.net/

- **Qcoder:** An open-source software. R package used in text analysis, it also offers a Shiny app for a more user-friendly interface. https://github.com/ropenscilabs/qcoder

- **Transana:** It is a specialized software for analyzing audio and video data. https://www.transana.com/

Additional QDA software options can be found here: https://www.surrey.ac.uk/computer-assisted-qualitative-data-analysis/resources/choosing-appropriate-caqdas-package

Qualitative Data Repositories (Castello, n.d.)

- **CESSDA Data Catalogue (CDC):** Social science data from over 20 European countries. It is a platform for all the data in the CESSDA archives across Europe and beyond. CDC provides a single access point to search through all the metadata. https://datacatalogue.cessda.eu/

- **eHRAF World Cultures:** It is a primary database comprising English information from an empirical social and cultural life perspective. It offers comprehensive access to information from various academic domains in culture and related disciplines. https://ehrafworldcultures-yale-edu.libproxy.temple.edu/

- **Figshare:** Figshare is a repository where users can make all of their research outputs available in a citable, shareable, and discoverable manner. Users can upload all of their data in any file format. It contains both qualitative and quantitative data. https://figshare.com/browse

- **Harvard Dataverse:** The Dataverse is open to all researchers. It assists researchers and data authors in publishing, sharing, and enhancing their research data. https://dataverse.harvard.edu/dataverse/harvard

- **ICPSR:** To access this data in ICPSR, users need to establish an ICPSR account. Log in through Facebook or Google will not work. It is a rich source of both quantitative and qualitative research data. One must click “Continue via Proxy Server” to log in. Temple University members have added access to the ICPSR. It is easy to access through the library’s ICPSR resources. Use “qualitative” data type filters. https://www.icpsr.umich.edu/web/pages/

- **openICPSR:** The open ICPSR data repository includes data sets that are self-archived by replication and curation along with other research data. https://www.openicpsr.org/openicpsr/

- **Qualitative Data Repository (QDR):** QDR is a Syracuse University-based repository. https://qdr.syr.edu/

- **Sage Research Methods Datasets:** This is a list of filter sets that create teaching data sets. It helps users learn the social sciences and quantitative and qualitative research methods. https://methods-sagepub-com.libproxy.temple.edu/datasets/discipline

- **UK Data Service:** It is the largest UK collection of social science data. It contains secondary qualitative data https://beta.ukdataservice.ac.uk/datacatalogue/studies/#!?Search=&Rows=10&Sort=0&DataTypeFacet=Qualitative%20and%20mixed%20methods%20data&Page=1&DateFrom=440&DateTo=2022

QualCoder

What is QualCoder?
QualCoder is a free, open-source software application for the coding of different types of non-numeric information, i.e. text, images, audio recordings, and video, which assists in the management and analysis of such data. Colin Curtain is developing and offering QualCoder, available on Linux, macOS, and Windows platforms (Curtain, 2023) under an MIT open-source license (QualCoder/LICENSE.txt at master · ccbogel/QualCoder · GitHub). It is designed to be a dependable, responsive, and easy-to-use tool that maintains transparency, rigor, and depth in the coding process (Brailas, Tragou, & Papachristopoulos, 2023).

Why Use QualCoder?

Since QualCoder is a free and open-source tool, it serves as a great choice for those unwilling to make a financial commitment to commercial software applications. Not only does QualCoder come without cost, but it also allows users to modify it according to their specific needs. Moreover, its open-source nature ensures users benefit from an active community dedicated to development support and problem-solving.

The other reasons below are likely the primary motivations for using QualCoder for qualitative data analysis needs.

Data capabilities	Analysis capabilities	Other Features
Code text	Intercoder reliability measure: Percent Agreement and Cohen's Kappa. Word cloud option	Data stored locally
Analyze and code images	Manual and automatic coding	Can work on projects together (but not simultaneously) and merge projects
Analyze and code video and multimedia files	Add memos/annotations to text	Aims to support REFI-QDA* standard (does not claim to be 100% compliant yet)
Import codebooks and lists	Run SQL queries	
Import survey data from Excel or in CSV format	Use journals to record thoughts	
Import bibliographic data (.txt or .ris format)	Import and create manual transcripts for audio and video	
PDFs converted to plain text	Organize codes into hierarchical categories	
Import Twitter data in csv format		

*Research Framework for the Interchange of Qualitative Data Analysis
Source: Illinois Library, (n.d.)

In conclusion, QualCoder is a fully reliable tool for qualitative analysis for researchers and those interested in this field. The latest version of the QualCoder has more outstanding functionality, making it suitable for novices and experienced researchers. By installing the software and following the guidelines as soon as it is downloaded, one will benefit from support and detailed guidelines by referring to the official website.

A Simple Guide to Using QualCoder Software for Qualitative Research

Step 1: Installation

QualCoder is suitable for the following operating systems: Windows, Mac OS, and Linux. However, it requires Python 3.10 or later version and a 64-bit VLC player to play audio and video. If possible, try to install Qualcoder in the Python environment to avoid installation problems with other software.

Run the installer either '.exe' file for Windows systems, or '.py' script (a setup script) available in the QualCoder directory for other operation systems like MacOS. The related links are given below:

- Installation files can be downloaded from GitHub following the link https://github.com/ccbogel/QualCoder/releases

- Instructions for installing and running QualCoder on Windows https://github.com/ccbogel/QualCoder/wiki/01-Introduction#windows

- Link to the QualCoder installation video for Windows https://temple.hosted.panopto.com/Panopto/Pages/Viewer.aspx?id=af715261-4295-4554-8a37-afba009f9929&start=0

- Instructions for installing and running QualCoder on MacOS https://github.com/ccbogel/QualCoder/wiki/01-Introduction#macos

- Link to the QualCoder installation video for MacOS https://temple.hosted.panopto.com/Panopto/Pages/Viewer.aspx?id=db149143-5c05-41d6-9b6c-b02e01181171&start=1.73274

Step 2: Importing Data

To import your data to the QualCoder for analysis, you can take the following steps:

Import Text Files: You can type in your text data at your comfort. You can also import your text search in any of the following formats: txt, odt, docx, html, htm, md, epub, PDF and as required.

Import Multimedia: You can similarly load images in PNG, JPG, BMP, GIF, or SVG, pictures in 'jpeg' format, and music in wav, mp3, ogg and MPG format. Videos can be imported in mp4 format (Curtain, 2023a).

Step 3: Coding Data

Assign Codes: When you're ready to begin coding, simply click and type to add your codes to text segments, or make selections within images, audio, and video.

Use Hierarchical Grouping: Group your codes into categories to create a structured coding framework (Curtain, 2023).

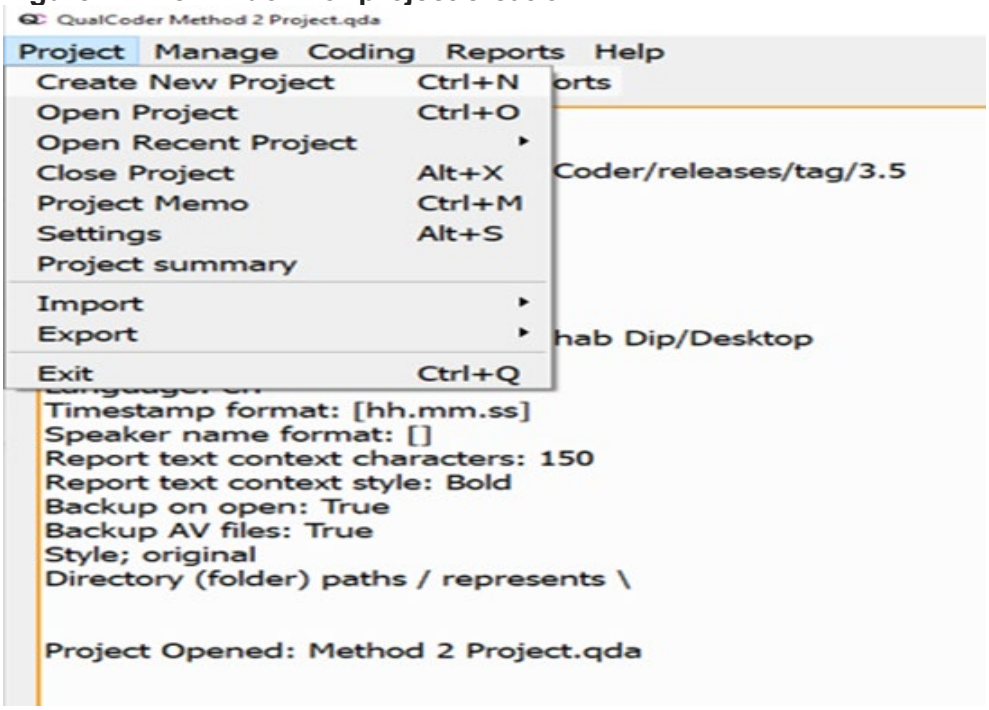
Step 4: Reporting (Analyzing Data) and Visualization
QualCoder can create various reports, such as visual coding graphs, coder comparisons, and coding frequencies, to assist you as you analyze your coded data (Curtain, 2023). The latest version of the software is 3.5, which introduced a word cloud option and an exact text matches report where multiple codes are applied to the same text (QualCoder, n.d.). These reporting features allow researchers to visualize their data and analyze coding patterns.

An Example of Coding Textual Data with QualCoder

The first step after installing and opening the software is to start a new project by selecting "Project," followed by "Create New Project" from the dropdown menu, as shown in **Figure 1**.

You need to give your project a name and choose a directory on your computer (Brailas, Tragou, & Papachristopoulos, 2023).

Figure 1: The window for project creation



When the project holder has been created, we have to gradually insert our research materials, such as the files containing the interview transcriptions from our study. To upload a file into the project, click “Manage Files” under the “Manage” feature (see **Figure 2**), and then upload the file as shown in **Figure 3**. Qualcoder is compatible with several data types, from text to audio, video, and PDF versions.

Figure 2: The window for importing data files

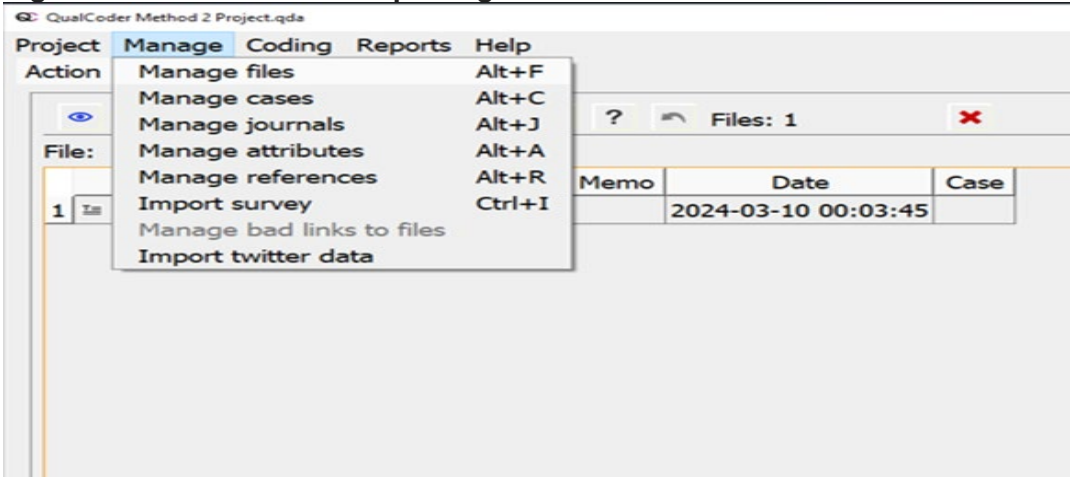
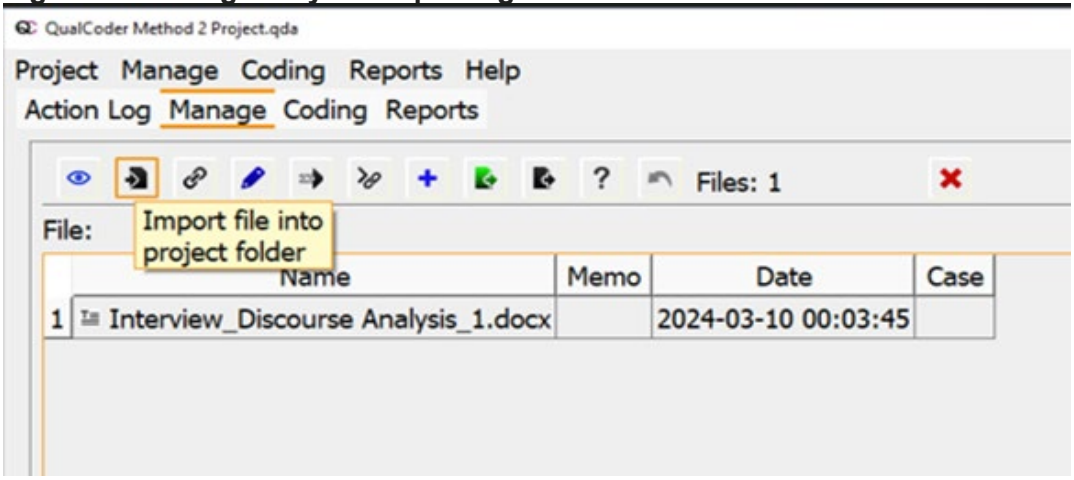


Figure 3: Getting ready for importing data files



To start coding the data, first, choose a source file and click on the "Coding" tab. Under this tab, you can see "Code text," "Code audio/video," and "Code PDF" options (**Figure 4**). Since we inserted a text file earlier, if you click the "Code Text" option, then this action will open the main window of the program (**Figure 5**), where new codes could be created, or existing ones chosen to be applied to particular text segments. Notes and memos could also be attached to the codes and their corresponding coded sections. Any text segment could be selected, and then a code from the code list (in the left part of the window) could be dragged and dropped onto it.

Figure 4: Selecting option under the "Coding" tab

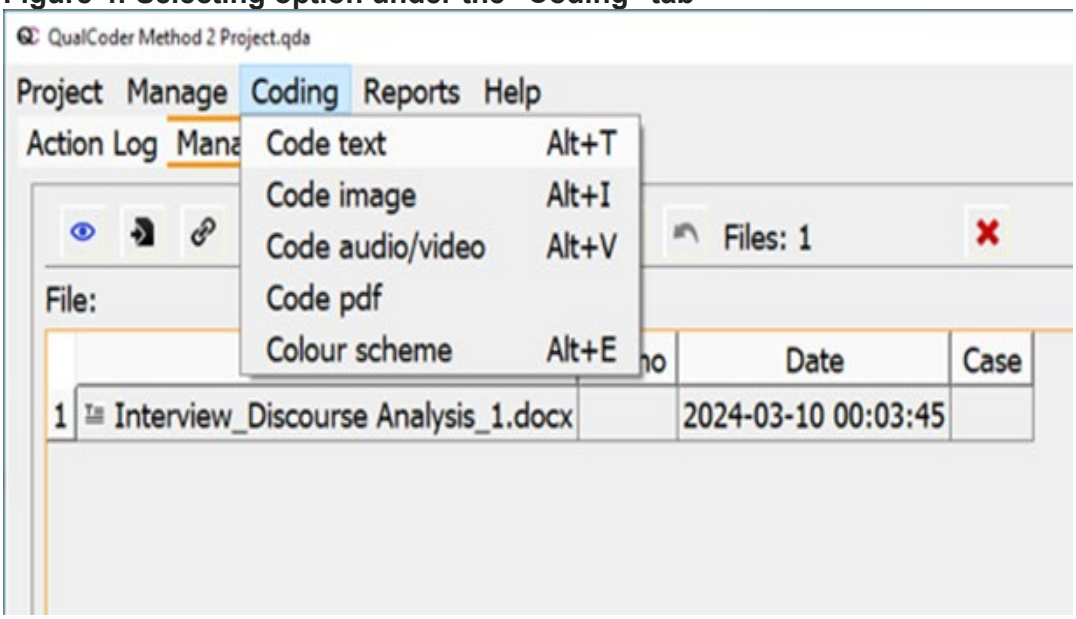
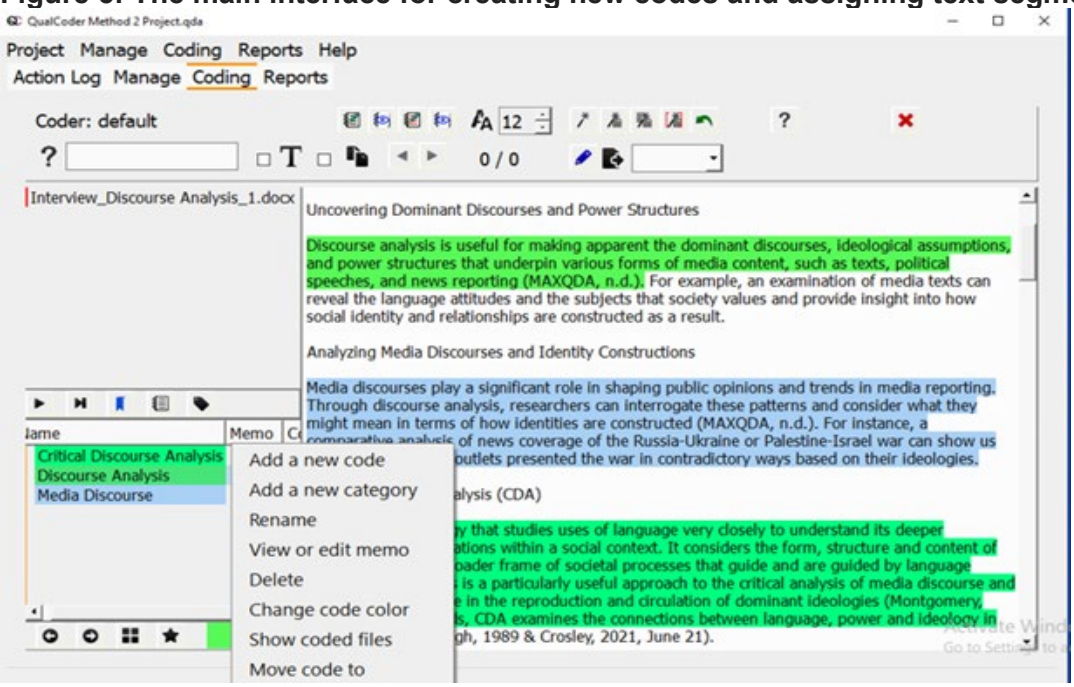
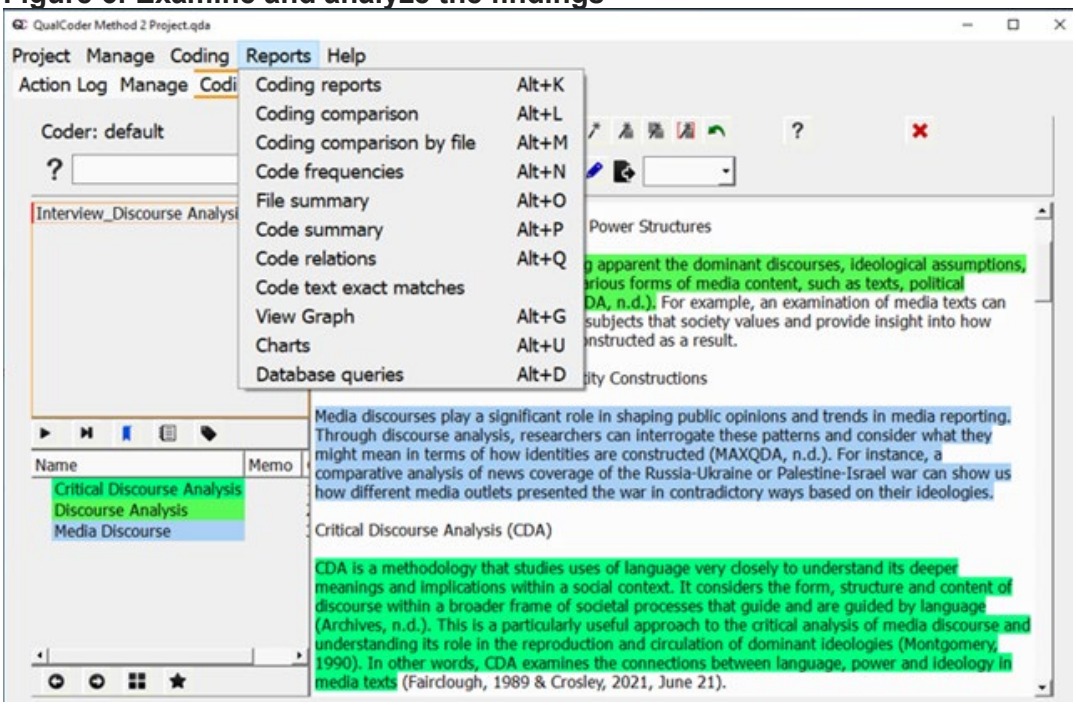


Figure 5: The main interface for creating new codes and assigning text segments to them



Once you've coded your data files, you can use Qualcoder's various features to examine and analyze your findings (**Figure 6**). For instance, you can produce reports to examine the frequency and distribution of codes in your data files and use these to craft visual representations to identify trends and themes within your data. Codes can be easily reorganized by merging or dividing them (Brailas, Tragou, & Papachristopoulos, 2023).

Figure 6: Examine and analyze the findings



Additional Resources

Video Links: How QualCoder Works

There are some YouTube videos that help understand how QualCoder works:

- Qualcoder - Data Hub Tool Talk – University of Idaho Library
  https://www.youtube.com/watch?v=119k-jNOl8I

- QualCoder Developer
  https://www.youtube.com/watch?v=WRB5Y5JLO4I
  https://www.youtube.com/@qcdeveloper5287

- If you are interested in viewing additional 'how-to' videos pertaining to different versions of Qualcoder, including the aforementioned two videos, you can follow this link:
  https://github.com/ccbogel/QualCoder/wiki/14-QualCoder-videos

- Similar to QualCoder, Taguette and qcoder are other free qualitative data analysis software. For further information on the functionality of Taguette, QualCoder and qcoder, please refer to the following links:
  - https://www.youtube.com/watch?v=7Q6358q6aCk&t=9s
  - https://guides.nyu.edu/QDA/FLOSSQDA
  - https://guides.library.illinois.edu/c.php?g=997192&p=10050831#:~:text=Run%20SQL%20queries

Official Online Resources for QualCoder
The official and most reliable resources for instructions on QualCoder are:
https://qualcoder.wordpress.com/
https://github.com/ccbogel/QualCoder/wiki

Support
Though QualCoder is an open-source resource with a manual for its various functions available on the GitHub wiki (https://github.com/ccbogel/QualCoder/wiki), you can still purchase the PDF manual for the current release, QualCoder 3.5, from this link: https://www.buymeacoffee.com/ccbogelb/extras. The manual gives comprehensive instructions and advice.

Additional Tips
Always download the current release with the most features and fixes from the GitHub Releases page: https://github.com/ccbogel/QualCoder

Research Using Qualcoder

There is a collection of over 85 research studies that have used QualCoder for their data analysis. A large number of these are provided with open-access links:
https://qualcoder.wordpress.com/studies-using-qualcoder/

Chapter 3 Works Cited

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Chapter 4 Text-Based Methods

Introduction to Textual Analysis for Media Studies

Textual analysis is the process by which scholars discuss meanings found in a text. The process of analyzing requires us to break down the text into parts and consider how they work together. The textual analysis of media texts is also referred to as critical analysis or criticism.

Before defining textual analysis, it is important to first specify what is meant by the *text* when considering textual analysis for media studies. According to Gray and Lotz (2012), "A text is any item of culture that users deem to have enough coherence to treat as a single object" (p. 27). Newman (2022) offers a more detailed definition: "A media *text* is an individual instance of media, something made by a producer and received by a consumer, an object like a magazine for sale by the cashier at the supermarket, or something we can regard as an object, like a social media interface or a show streaming on Netflix" (p. 34). Newman also takes care to differentiate text and content: The term text "reference[s] the object, the commodity or product, distinguishing it from its production or consumption" (p. 34). As such, textual analysis is separate from considerations about a piece of media's production or audience reception.

Boggs and Petrie (2004) note the challenges of televisual analysis: the texts we're analyzing "[move] continuously in time and space" and require us to "respond sensitively to the simultaneous and continuous interplay of image, sound, and movement on the screen" (p. 4). Whereas when analyzing a written literary work, you only have the written text, a televisual text has multiple aspects that need to be considered in analysis. Think about all the elements that comprise a televisual text: dialogue, music, set design, shot composition, costume design … the list goes on. When conducting textual analysis with televisual media, scholars must take into account the combination of many of these elements and consider how they work together to convey a message. However, not every single aspect of a text needs to be included in a good analysis; indeed, it would be impossible to analyze every element of a film or television show in one analysis. The next section will discuss how to select a media text or multiple texts for analysis, how to select the elements on which your analysis will focus, and which types of textual analysis may be most helpful for understanding your chosen text or for exploring your research question.

Key elements to include in the analysis of televisual texts include the narrative (the story being told); themes, issues, or ideas being explored by the text; and sound, including music, dialogue, and sound effects. As these are visual texts, scholars also often analyze their visual elements. One way we can think about the visual analysis of films, television shows, and music videos is by identifying and breaking down "shots" from the text. "Shots" are defined as the "images of a film sequence" (Ryan & Lenos, 2012, p. 12), but shots are of course not unique to film; they are the basic building block for all televisual texts. There are several aspects to consider here such as the composition of the shot, which Ryan and Lenos (2012) describe as "the arrangement of elements within the frame of the image" (p. 12). We can also look at the cinematography of the shot, or the way in which the camera captures this particular moment of the film. Researchers can focus on editing, or how the sequence of shots was put together in editing. Finally, it is important to look at production design, or how the shot was composed in terms of setting, costuming, and lighting.

Special Considerations for Analyzing Televisual Media

Each type of text covered in this section (film, television, music videos, and video games) has its own unique qualities, and therefore special considerations should be taken into account when analyzing each. A film, for example, is usually meant to be watched in one sitting, and typically contains a singular, self-contained story. Contrastingly, television shows include multiple episodes and often multiple seasons; their stories are, therefore, longer and more drawn-out, but it's never guaranteed that a television show will be produced to its narrative conclusion. Because of the way television is produced, it may feature an ever-changing cast of actors, writers, and directors; though in textual analysis we will only focus on the text itself, this aspect of TV production differs greatly from film production and typically affects the text we're left to analyze.

Music videos are the shortest of the types of televisual texts in this section. Music videos only sometimes tell a narrative story, so media scholars must approach their analysis differently than they approach the typically narrative forms of television and film (though exceptions to the narrative forms of TV and film will be discussed later). In music videos, instead of dialogue between characters, viewers usually hear the song for which the music video was produced. However, like film and television, music videos often visually communicate messages to viewers, along with messages delivered through the music and lyrics.

Analyzing Film

While there are many shared aspects between all televisual texts, there are some important distinctions between them, and special considerations for each. We'll start with film since it was the first of the three to be invented and introduced to the public.

Films, or movies, are intended to be viewed in one sitting. They were also initially intended to be viewed in a public theater, with other viewers. However, new technological developments have since allowed for at-home film viewings. Full-length feature films tend to be between 90 to 180 minutes, though runtimes can vary. Whereas television production teams often change throughout the course of a show's run, production teams for films remain consistent throughout. This means that the final result is often the vision of one particular team, or sometimes one particular person.

Example Film Analysis

For our example analysis, I'll be referring to a film that was written, directed, and designed by one individual: the 2016 film *The Love Witch*. This film was helmed by one person, Anna Biller, who served as its screenwriter, director, costume and set designer.

Choose the film: I personally love anything having to do with witches and witchcraft. I'd seen clips from the movie on social media, and my interest was piqued. I decided to analyze it for a project I proposed about the portrayal of witches in film.

- You might pick a film to analyze because you've already seen it and you have thoughts about it, or
- You haven't seen it yet, but you've heard about it, and you believe it's relevant to a topic you already have a research interest in (this was the case for me with *The Love Witch* analysis, as I was interested in media depictions of witches but had not seen this particular film), or

- A bunch of other possibilities! Maybe you saw the film and hated it, or you've seen a lot of discourse surrounding it that's relevant to your research interests and figure it might be something to take a look at, like how I felt when *Barbie* came out and there was tons of feminist chatter about it on the internet. Whether you're already familiar with the film or not, you should expect to get familiar during the research process.

Another thing to consider in the selection process is whether the film is accessible/how you'll access it if you don't already own it or have streaming access to it.

Watch the film: You'll want to watch it more than once. The first time, just take it in. Get to know the plot, the characters, etc. If anything immediately strikes you as particularly interesting, jot it down. The second time you watch it, you'll want to figure out which scenes or aspect of the film is the most relevant to your analysis. The first time I watched The Love Witch, I noticed there were many scenes in which the characters made overt mentions to patriarchy, empowerment, and sexuality. The second time around, I paid special attention to any mentions of these themes, as well as any allusions to these themes; so, even if the characters weren't explicitly talking about sexual empowerment, I still made note of any time a character was portrayed in a sexualized manner.

Choose the important stuff and take a ton of notes: You won't be able to analyze every aspect of a two-hour film. And every aspect of the film won't be important to the point you're trying to make in the analysis.

Your research interest/question will help you to narrow this down as you watch. The Writing Center at UNC Chapel Hill categorizes film analysis into four types:

- Semiotic: Semiotic analysis focuses on signs and symbols; if you're interested in thinking about what symbols mean in a broader cultural context, you might want to do a semiotic analysis.
- Narrative: This type of analysis considers the film's story as a whole.
- Cultural/historical: This type of analysis is an "examination of a film's relationship to its broader cultural, historical, or theoretical contexts" (UNC).
- Mise-en-scene: UNC describes this type of analysis as interpreting "how the filmmakers have arranged compositional elements in a film and specifically within a scene or even a single shot."

At this point in my analysis of *The Love Witch*, I realized what my focus would be: I wanted to make the case that *The Love Witch* was a critique of postfeminist messages being sold to women in mainstream society, so I was going for a cultural analysis. While I initially approached the project with a general interest in the portrayal of witches and witchcraft, I allowed the actual text to guide me to a more specific question about postfeminism. (I was utilizing the process of grounded theory here, and I didn't even know it!)

Now that I knew what I was going to focus on, I went back to my notes and selected the scenes that were most relevant to postfeminist messages. Then, I rewatched those scenes several times; sometimes I focused on dialogue, and other times I focused on visual aspects. I took many notes. I recommend taking notes on paper, because you can more easily note connections between certain scenes or aspects of the film. If a line of dialogue strikes you as important, I recommend having a separate typed document where you transcribe the dialogue and note the timestamp of the scene. You of course may develop your own system, but this is

what has worked for me. Another recommendation is to try to find the script online. If it's available, you'll save yourself time and be sure you've got the exact wording correct.

This process of making notes, identifying themes, labeling observations, and the general process of "unriddling" what you're seeing on the screen is often called "coding." It's an important part of the research process, but is often done in an informal manner, whether you're scribbling on post-it notes that you can move around or grouping ideas together in a word document. Your coding process won't have a place in your final article the way an experiment would be explained in a methods section, but so much of the research process takes place in this stage of observing, asking questions, and grouping ideas together.

Start writing your analysis: SO, you've chosen, watched, and taken notes on a film. Congratulations! You're ready to start analyzing. In truth, you've already started the analysis process by noticing themes, taking notes, and drawing connections. I'm going to include the planning stage in this step as well, but you might consider that a separate step if you're a fan of formal outlines.

This next part is going to be tricky to describe, because there is no right or wrong way to write an analysis, but please bear with me. These are my suggestions, but again, feel free to develop your own system.

First, figure out a general idea of what your argument (aka your thesis) is going to be. Oftentimes, you will get a better idea of this after you start writing, but that's what editing is for. In the example, my general argument is that *The Love Witch* can be read as a critique of postfeminist messages.

Next, figure out your sub-arguments. How are you going to prove that your thesis is supported by what's actually in the movie? Nowhere in The Love Witch did a character stand up and say, "I critique postfeminist discourses!" So where am I getting this idea that it's critical of postfeminism? Using my notes of important scenes and other aspects of the movie, I try to group them into sub-arguments. My sub-arguments for *The Love Witch* were that the film criticized postfeminism in three ways:

- By equating witchcraft and empowerment with conventional femininity
- By emphasizing the coven's ardent belief in upholding traditional gender roles
- By making the claim that the path to women's empowerment is through sexual means

I decided where each scene/aspect of my notes would best fit. Then, I started breaking down each scene. I tend to focus mainly on narrative (aka the story being told) and dialogue in my analyses, but I also made mention to stylistic choices, like the fact that the movie is designed to look like a 1960s Technicolor film (coincidentally the same time period during which *The Feminine Mystique* was published and gained popularity).

I won't bore you with the entirety of the paper here, but I've provided a brief analysis of the film's feminism, which in the paper functioned as an introductory paragraph.

"In *The Love Witch*, styled in the aesthetics of 1960s Technicolor films, characters expressly discuss the ways in which witchcraft and misogyny are linked: the main character, Elaine, is told by her mentor and high priestess, Barbara, "The whole history of witchcraft is interwoven with the fear of female sexuality. They burned us at the stake because of the erotic feelings we elicited in them. Later, they used marriage to hold us in bondage, and turned us into servants, whores and fantasy dolls, never asking us what we wanted." Indeed, contemporary discourses

have identified the witch as a cultural figure reappropriated from its once-demonized position to one of empowerment; deviancy from patriarchal norms and sexual freedom are now things to celebrate. As Barbara speaks, the camera turns its focus to the stage behind her, where a woman dances and removes articles of clothing as the (primarily male) audience hoots and hollers their encouragement. They are at a burlesque bar, a place which is noted by the witches in the film as a location where women can be empowered through the owning of their sexualities. The juxtaposition of Barbara's words and the male audience's reaction to the dancer reveals a tension in this seemingly-feminist philosophy. Towards the end of the film, when Elaine's lover, Griff, outs her as a witch to the patrons of the burlesque bar, they begin chanting "Burn the witch!" as the camera focuses on many of the men closing in on Elaine as they unbutton their pants and hold her to the ground. Griff is able to fight off the angry mob and whisk Elaine to safety, but the connection between witchcraft, eroticism, and misogyny is made abundantly clear. However, *The Love Witch*'s feminism is not quite so cut and dry. In fact, the movie can be read as a critique of postfeminist discourses in three ways: first, through the equating of empowerment with conventional femininity; second, through the coven's ardent belief in upholding traditional gender roles; and finally, through the claim that the path to women's empowerment is through sexual means."

Here, I explored the relationship between the dialogue and the visuals in the burlesque club scene, which are at odds with each other.

Another example by Rachel Moseley (2002) is also an analysis of witch characters in film. Moseley's article is an excellent example that includes both film and television analysis. If we focus on her analysis of the film The Craft, we'll see her expertly weave different aspects of film into her analysis. Here are just a few examples I've highlighted, but I highly recommend reading "Glamorous witchcraft: gender and magic in teen film and television" by Rachel Moseley if you'd like to see more.

- Setting: "Setting more generally is significant in the film; however, the girls' high school is drenched in religious iconography, with crucifixes and images of the Virgin Mary."

- Symbolism: "The Madonna is a particularly interesting motif in this film, for it is suggestive both of the emphasis on the Goddess, on the feminine and feminist principles in Wicca, but also invokes Madonna as pop cultural icon, and her postfeminist reappropriation of that iconography - in particular crucifixes and rosary beads."

- Casting and costuming: "… the film ultimately becomes a battle between Sarah and Nancy, who are seen, respectively, as natural witch, mother and maiden, and unnatural hag. These distinctions are marked out through casting and clothing. Sarah's home is a gothic, Spanish-style villa - a natural space covered in creepers and bougainvillea, dark, golden and dripping with water. Sarah's real mother is dead, but the photograph she has of her shows her in a garden, in a flowing dress and hat. Sarah is also repeatedly represented in this way. Conventionally feminine, with long hair and usually dressed in earth tones and floral prints, Sarah's relationship to nature is persistently marked out. … Nancy's difference is marked out through the casting of Fairuza Balk, whose looks are less conventional, and her costuming in leather, metal and gothic makeup …"

Through a discussion of these and other elements of the film, Moseley argues that conventional beauty standards for women are used in witch media to differentiate "good" witches, like Sarah in *The Craft*, from "bad" witches, like Nancy.

Here are some things to keep in mind before you embark on your own analysis:

- **Who worked on the film?** Directors will often have a signature style; it's almost impossible not to note similarities between all of Wes Anderson's movies, or the "Kubrick stare" seen in many of Stanley Kubrick's films. Additionally, I would be remiss not to mention that Anna Biller served as director/screenwriter/costume designer/set designer for *The Love Witch*.
- **What kind of film is it?** Genre, small indie movie, mega blockbuster, etc.
- **When was the film made?** What were the events happening in the world at the time of the film's production? It would be quite difficult to analyze *The Gold Diggers of 1933*, for example, without mentioning World War I or the Great Depression (Ryan and Lenos, 2012, p. 155).
- **Is the film part of a series?** Does it have or is it itself a sequel? This is important because then the story will not be self-contained; if it is part of a series but not the first film in a series it will likely draw on plot points and character arcs that were established in the preceding films.

While these elements are not part of the text of the film themselves, they will absolutely influence the text of the film and help you to better understand the meaning of the film, as I did by referencing an interview with Biller in my analysis. This can be considered a paratext, which you can read more about here.

Analyzing Television

According to Gray and Lotz (2012), "television wasn't being read closely with any real rigor until well into the 1970s" (p. 27). Today, there is no shortage of television analysis.

Something to keep in mind when considering the differences between film and television analysis is the ubiquity of TV. The majority of US homes have a TV, and with the advent of streaming services, one does not even need a television or a cable subscription to watch "TV"; a laptop or even a phone and a Netflix or Hulu subscription is enough to provide viewers with hours upon hours of shows. As Thompson and Mittell (2013) note, "television is (and always has been) more than just furniture, and now in our era of convergence among different technologies and cultural forms, there is more TV than ever" (p. 5). They continue, "even as it gets reconfigured in the digital era, television is still America's dominant mass medium, impacting nearly everyone" (p. 5). Not everyone goes to the theater to watch movies, but watching television to some extent is an everyday activity for many Americans.

For this section, we will be focusing mostly on scripted fictional TV texts, though we'll also touch on reality television. For more information about the analysis of news, please see this section on Discourse Analysis.

The process of analyzing TV is very similar to the process for analyzing film, with some extra considerations. Because television is serial and not a self-contained story, you'll have to decide, based on your research interests, how to select exactly which aspects of the texts you'll analyze. For example, you can decide whether you want to focus on one episode or season of the program, or a collection of scenes from across the show's run.

For example, in Thompson and Mittell's (2020) book, Noel Murray contributes a chapter on the hit '70s sitcom *M*A*S*H* which focuses on one episode of the show in Season 4, titled "The Interview." On the other hand, in my own research, I've pulled scenes from across the entirety of *Crazy Ex-Girlfriend*'s run to make my point. Deciding the limits of your analysis should be one of your first steps. Think about what might be relevant to your research interests. As mentioned earlier, I was interested in media texts that are resistant to postfeminist messaging, so I chose a variety of different scenes that I found to be relevant. Murray likely chose to focus on one episode because the episode's full narrative helps him to make his point about the social relevance of television.

Once you've decided the boundaries of your analysis (full episode, multiple scenes, etc.) you can utilize the steps laid out in the film analysis section. Keep in mind that if you go the route of stringing together different scenes from the show's run, as I did, that there might be some plot contextualization needed for readers to make sense of disparate scenes from different episodes. Just be sure not to spend too much time on summarization, and try to blend your contextualization into your analytical interpretations.

I've included an example from my analysis of *Crazy Ex-Girlfriend* in which I analyze one scene (though the whole essay includes multiple scenes). One thing to keep in mind is that *Crazy Ex-Girlfriend* is a musical comedy, so the following example will also be relevant to music video analysis, which I'll expand on in the next section.

Example:

A critique of postfeminist messages comes in the form of "Put Yourself First," a musical number featured in the middle of the show's first season. In the episode, Rebecca is supposed to give a speech on feminism and empowerment to a group of teenage girls from disadvantaged backgrounds. They heckle her until she finally breaks down in tears in front of them, admitting that she is not the right person to talk to them about feminism because she is in the midst of chasing a man who will never love her back. She laments: "I'm the one who needs to be empowered." The teenage girls approach the stage to comfort her; feminism did not create a bond between them and Rebecca, but her boy problems finally helped them relate. "Don't worry," one of the girls says. "We'll empower you up."

Rebecca assumes they will suggest reading Gloria Steinem, taking a ceramics class, and growing out her armpit hair, but instead the girls whip out their makeup bags to give Rebecca a makeover. During the makeover montage, the five teenage girls are simultaneously shown as a girl band on a photoshoot set in a parody of Fifth Harmony's "Worth It" called "Put Yourself First." These music video world versions of the girls are dressed in heels and tight, revealing clothing. Within the first verse, the song's true message is revealed: "Make yourself sexy, just for yourself, so when dudes see you put yourself first, they'll be like 'Damn, you're hot, wanna make out?'" As the girls dance on their music video set and sing about the joys of "push[ing] them boobs up, just for yourself," a photographer wearing a sweatshirt labeled "MALE GAZE" snaps pictures, in case the irony of the song's message was not already clear. Halfway through the number, Rebecca protests at the girls' suggestion to wear heels just for herself: "If it's just for myself, shouldn't I be comfortable?" to which the answer is a resounding "No! Put yourself first in a sexy way." Later, Rebecca similarly objects when the lyrics change to "put yourself first for him." She argues that if she is putting herself first for a man, then she is by definition putting herself second. The girls smile and respond by singing that she shouldn't think about it too hard —similarly to the way in which dominant media messaging encourages women not to think too hard about whether their beauty routines are truly empowering or just a repackaged product of

patriarchal norms. Rebecca, however, takes their advice, and by the end of the song she genuinely thanks the girls for teaching her the "true" way to get what she wants. She looks ridiculous and not at all like herself, as the girls have made her over using their own high-school beauty standards. As a result, Rebecca is sporting eyeliner, hoop earrings, and a leather hat given to her by the young girls that look out of place on an adult woman. "Thank you, sisters," she says, overly sentimental; her silly appearance and reaction to the makeover signify to the audience that we should not take her gratitude seriously.

For more examples of TV analysis, see Thompson and Mittell's (2020) *How to Watch Television*, each chapter of which features the analysis of a different TV show focusing on multitude of themes, including representation, politics, and industry.

Analyzing Music Videos

Music videos are probably the most different of the three types of televisual texts in this section. While there are certainly many differences between film and television that will affect analysis, they always contain a narrative element.

This is not always the case with music videos. Some videos simply features the artists performing the song, like Stevie Nicks and Tom Petty's "Stop Draggin' my Heart Around," one of the first videos to play on MTV. Other videos do contain narrative elements, or are fully narrative. Music videos analysis will require you to interpret the relationship between the audio and the visuals. Sometimes, the story acts out the song's lyrics, which is called "explicit-narrative" and other times the narrative doesn't follow that of lyrics, which is called "extra-narrative" (Osborn, 2021, p. 68). Some videos combine different types of music video styles, so shots of a performance might be interspersed with a visual narrative. It will be up to you to find the connections or tensions between what is being verbalized and what is being shown.

Let's look at an example. For a project about displays of sexuality by women of color in music, I analyzed Nicki Minaj's "Anaconda" music video. I started by watching the video a LOT of times, which earned me some odd looks at the campus library. I collected time stamps for certain shots of the video which intrigued me. I also noted aspects of the video that didn't have a particular time or moment, but were present throughout, like the costuming, set design, and lack of male dancers or actors until Drake's appearance at the end. Rather than considering dialogue, I instead analyzed the relationship between lyrics and the accompanying visuals. For example, at two points in the song, Minaj raps about the men she has sex with buying her designer clothing. In each instance, the shot changes from the main set with backup dancers. As I note in my analysis, "when she describes the men buying her designer clothing, she is shown modeling the outfits in an empty room—men may have bought her these items, but Minaj is still completely independent." In this sentence, I connect my observations of the audio and visuals (Minaj modeling the clothes by herself in a white room while rapping the lyrics) to my own reading of the shot (she is showing her independence). Connecting your observations to your thoughts on the meanings of said observations is the key to textual media analysis.

Another person might read this video, and these specific shots, in a completely different way. Indeed, I mention in the analysis that bell hooks, a scholar and writer I greatly admire, absolutely disdained the "Anaconda" video, not finding it to be subversive in the way that I did. That's okay! In fact, differing opinions on what a text "means" is what makes textual analysis such an interesting avenue for research. hooks' critique of the video was actually one of the driving factors that led me to check it out in the beginning of my research process, when I was

still solidifying my topic of interest. I thought I wanted to critique overt displays of sexuality in music videos, but after actually watching Minaj's video and having a totally different reading of it than hooks, my actual research topic came into clearer view.

The key to making sure your analysis is strong is to make sure you have strong supporting evidence. If my only evidence that Minaj's music video can be read as empowering was the example above, that would probably be a weak argument. There were many other aspects of the video that I provided as examples of subversion of the misogynistic expectations placed on women in hip-hop videos. The most in-depth "scene analysis" I conducted was on a scene that takes place in a set designed to look like a kitchen. Take a look:

Minaj rejects the idea that she is an object to be looked at, and repeatedly puts herself in the position of the "boss," both in her work and her interviews. In fact, when interviewed about the infamous banana scene in the Anaconda music video, in which she at first pantomimes performing oral sex on a banana before breaking it in half with her hands and chopping it up with a knife, she specifically rejected ideas about masculine control over her choices. She told MTV News, "At first I'm being sexual with the banana, and then it's like, 'Ha-ha, no,' … That was important for us to show in the kitchen scene, because it's always about the female taking back the power, and if you want to be flirty and funny that's fine, but always keeping the power and the control in everything."

The kitchen scene also serves to exaggerate and parody "acceptable" and "respectable" femininity—namely, white femininity. In the first few seconds of the shot, Minaj looks the part of a housewife ready to make a cake: wearing an apron with her pink hair in a bun, Minaj is the epitome of domesticity. But the shot is interspersed with footage of Minaj twerking in the jungle, and soon, the camera cuts back to the kitchen, where an apron-clad Minaj begins to cover her breasts and butt in whipped cream, an overt and trite sexual innuendo. But just when one might think Minaj is performing for the male gaze, she does her stunt with the banana, grimacing at the camera, and effectively cutting off any fantasies of Minaj performing oral sex for the viewer's enjoyment. This scene in the kitchen is an exceptional parody of white domesticity and the idea of the "proper wife." Here, Minaj points out that this domestic ideal is constructed in conjunction with whiteness—it is only accessible to white women. This hearkens back to Collins and the idea that white femininity only has value and meaning insofar as there is a deviant construction of others. As hard as Minaj might try in the video, she will never be the perfect domestic wife simply because she is not white, and therefore must be sexually deviant—hence the antics with the banana. This short kitchen scene speaks volumes about women of color and their exclusion from a "respectable" status: even if they play the part, Black women can never be respectable because the construction of respectability is reliant upon their exclusion. Through her work and her public persona, Nicki Minaj rejects respectability politics.

As you can see, the analysis makes reference to scholar Patricia Hill Collins' work on Black sexual politics. While you certainly don't *need* to reference theory in your analysis, doing so might be helpful to your case, depending on what you're analyzing. Many analyses you come across will reference Marxist theory, feminist theory, queer theory, etc., and will draw upon the work of other scholars.

Music videos are great if you're concerned about access, which is one of the reasons my undergraduate thesis project revolved around music videos. Rana Emerson's (2002) analysis of music videos in 2002 required her to tape MTV and VH1. Now, new music videos being

produced are typically uploaded to YouTube, and old music videos are extremely easy to find there as well.

This section focuses more on the televisual aspect of music videos, but if you're interested in further exploring music analysis, check out Brad Osborn's (2021) *Interpreting Music Video: Popular Music in the Post-MTV Era*, which delves further into lyrics and visuals, but also includes a section on analyzing the music itself. For another excellent example of music video analysis, I recommend Aisha Durham's article "Check On It," which features an analysis of the Beyonce song of the same name.

Analyzing Video Games

While the debate on if video games count as texts to be analyzed has for the most part been settled, there are still major differences between video games and other media that are necessary to know before conducting textual analysis (Cole, 2021). Note that while "textual" analysis might imply text heavy games, this process can be used for other games- a scholar examining multiplayer esports games can follow these same steps for their analysis.

Games are typically very expansive, making it more difficult to say what qualifies as "finishing" a game. Is it necessary for you to find every piece of dialogue in the game before considering it done? Is it whenever you've reached the end credits? Do you consider it complete when you've played for a certain period of times or completed a particular mission? Some familiarity of the game might be necessary to know what "finished" is: for example in *Nier Automata* a second playthrough is radically different from the first, which you might not know before playing the game. Note also that you might not need to finish the game yourself- the use of walkthroughs or let's plays online are entirely valid approaches to analyze video games.

Playing is the most obvious distinction between games and other types of texts. Games have some input from a player, and that can result in various different understandings of the game depending on the choices a player makes. These choices are not necessarily just story choices either- a player who is an expert at a game will have a different experience than a player who just picked up the controller for the first time. Typically, when you have enough experience with a game to write an analysis of it, you will likely be an expert in the gameplay of it, which means your understanding of the game will be quite different from other players. Games typically have multiple difficulty settings to differentiate player skill, and as you gain more experience in a game you will be more easily able to approach higher difficulty modes than a casual player would.

Step by Step Guide to Textual Analysis of Games

Step 1: Figure out your Research Question

What are you interested in studying? Your research question will affect every step after this, making this critical. It is beyond the scope of this guide to explain how to develop a research question, but having a research question can allow you to better approach your text and make sure your analysis is relevant and cohesive.

Of course this does not require having written out R1, R2, and R3, and especially does not mean coming up with a matching hypothesis for each question. What you want to do is merely

have a topic to organize your work around and allow you to focus on. Even just one game can be so large it can be impossible to say anything cohesive about the entirety of the text. Knowing, even just internally, what you are interested in about the text, will allow you to better approach your analysis.

Step 2: Decide on what games you will analyze

This relies on your research question. If you're interested in how *Final Fantasy* as a series has changed over time, you have to decide what the limits of that research question is- will you study every single *Final Fantasy* game ever released, which is over 100, or just mainline "numbered games", or just enough representative games you deem as important for your research question?

You likely have a sense already about what games could be valuable to answering your question, but sometimes you might be unsure. In those cases, you should investigate what other scholars interested in your topic have discussed, and decide on if you should analyze the same game, or branch out to games that seem similar, such as sequels, games from the same developer, or the games inspired by those analyzed by other scholars. You can also use databases to your benefit- the LGBTQ video game archive divides up queer representation by various types such as easter egg or romance, while the Steam store has various user assigned tags that could allow you to discover games relevant to your research topic. In addition, the Visual Novel Database allows you to search by tags, which could allow you to find a visual novel that has some particular trope.

When picking games, you need to keep in mind the constraints of time. You can use how long to beat to get a sense of how long most players take to finish a game, if you are hoping to play these games from start to finish. You can, of course, find video recordings of the game to get necessary information instead, but that will still take time. The more games you analyze and the longer they are, the more time you will take before finishing your analysis and the more data you will have to sift through.

Step 3: Gather Necessary Material for the Game

If you decide to use walkthroughs or let's plays instead of playing the game itself, this means finding those walkthroughs. An initial good start for this would be to search YouTube for no commentary playthroughs, or just cutscenes if you are only interested in non-gameplay sections of the game. Of course, if you're inserted in commentary you should instead search for let's play on youtube. You could also search on lparchive or twitch to find commentary and gameplay. This could be useful if as part of your analysis you wanted to see user responses to a game, and get a sense of how they approach and play it. Of course these materials are also useful if you are playing the game yourself- walkthroughs and playthroughs can help you uncover additional information you might not find on your own.

You might assume that this step is simpler if you just want to play the game instead, but that is not necessarily the case. You have to decide what version of the game you want to play, and how you will play it. Let us take as example *Tactics Ogre: Let Us Cling Together*. The game originally was released for the super Famicom in Japan, and that version received ports to the playstation and the sega saturn. Those ports have several small changes. The game was remade for the playstation portable with new art, totally different gameplay, additional story

scenes, and a new translation with a different tone. There was then a second remake of the game released for the playstation four, nintendo switch, and personal computer with different gameplay yet again.

A different port of the game will be a different experience, and you need to know what version of the game is best suited for the research question you are asking. When you have decided on a version, you then have additional choices! If you decide to play the most original possible version of *Tactics Ogre*, you will have to find a super Famicon and a japanese cartridge of the game, and hook the game up to a CRT television. It is possible to find a fan-made english translation of the game and play it through those on a super nintendo (the North American version of the Famicon). If you are using a fan-made translation, however, you might decide to simply emulate the game instead.

Emulation is legal, though the process of finding a game for your emulator to load can be decidedly less so. This wiki site is well kept and has some of the basic information you might want to know to set up an emulator and which emulator is best for the system you are trying to replicate. Emulation has several advantages over playing the game on original software. Emulators allow you to save whenever you wish, and it is much easier to set up mods or hacks of the game that might be useful for your research (Or simply to fix an annoying bug). These mods also include translation patches- if you don't speak japanese you will likely be locked out of many video games if you don't learn how to emulate and apply patches to video games. Of course, if emulation requires more technical skill than you wish to apply, you can always stick to video game store fronts and play games through them to answer your question.

The final necessary material you might want to gather is game manuals. While these are less common for modern games, older games assume you have read the manual and are quite difficult to play without the knowledge held in them. You can likely find the manual through the developer's website or on a storefront if the game has been rereleased for the personal computer. If you aren't having luck finding it there, you might have to search for it through a search engine. In addition, even for modern games, sometimes you might find it valuable to search up fan-made guides to the game.

Step 4: Analyze the Game

The most difficult step. I personally prefer to do a first playthrough experiencing the game as "Naturally" as possible, before a second "analysis" run, but this isn't always possible. When doing analysis, have some way to take notes ready for you. I prefer handwritten notes that I then transfer to an electronic document. These notes you take should be focused on your research question.

It is also best if your note has some detail connecting it to a specific game state- that will make it easier to understand where you were in the game, and allow you to replicate that event if you need to. For example- "bayonetta breakdance- the gaze/control?" is a less useful note then "Unlockable technique- hold ZR and breakdance animation plays, ends with camera shutter effect as Bayonetta poses- the gaze/control?" Both get across the same idea of a specific action in *Bayonetta* being connected to the gaze and questions of control, but by being more specific you will know when looking at your notes what you were referring to, and more easily replicate the event you were writing about.

You will want to continue writing down your notes until you feel you have gathered all the replicating patterns you can find. What this means is, regardless of what you have considered "finished" prior, if you are still finding something new and interesting that is related to your research question, you should likely continue to analyze the game. Going over the same sections multiple times, or playing the entire game multiple times, might take a lot of time, but if you are finding new themes each time, it is useful. If you are writing the same notes over and over, however, you might have discovered everything you need to know, and can move on.

Of course you don't need to have notes for the entire game. If you are only interested in how baseball batting is implemented into video games, most of your early time in *Yakuza* before the baseball cages minigame is unlocked can be on auto-pilot. Similarly, if you are only playing the game for a particular character, scenes without that character might not require much attention besides just noting how those scenes differ. .

You will also want to have an easy way to take screenshots or recordings of the game. Another benefit of emulators- it is much easier to record your screen there. Be aware of how you can transfer images taken from your system to a separate device, or if the system has no way of taking images, be aware of how you can connect a recording device so you can gather images. Even if you don't plan to have those images as part of your main analysis, they are invaluable when making powerpoints or double-checking the exact wording of a scene. Of course, video walkthroughs can double in a pinch, but might not have the exact moment you want, and you have to credit images from others. You hold the copyright in the US for any screenshots you take yourself.

Step 5: Find Paratexts

"Paratexts" are supplemental textual objects that are connected to your object of study (Consalvo, 2017). Think advertising materials, art books, walkthroughs (officially licensed or otherwise- fan made paratexts are still paratexts) or creator interviews. The term originally came from film studies, where video game adaptations were paratexts from the primary film text, but we can do the same to them. While you can treat the *Uncharted* film as a paratext to the *Uncharted* series, paratexts are adaptable enough that you can consider the James Bonds films as paratexts to the playstation 2 game *James Bond: Agent under Fire*. What matters with paratexts is what is supplemental to your analysis of the text. .

Paratexts matter because they give you a better sense of how this text was conceptualized and understood. When looking at paratexts, ask yourself if you note any gaps between the ways they are describing your text and how you personally analyzed it. Is there something interesting in that inconsistency? If they are similar, meanwhile, you can use paratexts to support your argument about the game as text.

Art books in particular are commonly produced paratexts for video games that are very useful for your analysis. The book will have full design sheets if you are doing a visual analysis of the game, will likely have some character and setting information that isn't covered in the game, and analyzing the concept art can give you a better sense of what themes developers were interested in focusing on. Despite having little overt sexuality in game, the concept art for *Parasite Eve* is rife with sexual images. That means something that you can organize your analysis on.

Don't forget social media! If you are analyzing how *Metal Gear Solid* represents women, game director Kojima's tweet about one of the women would be useful to know ("But once you recognize the secret reason for her exposure, you will feel ashamed of your words & deeds" is a great quote to organize your analysis around). You can use social media both for how game creators are describing their games as well as how players of the game understand it. Go to the section here for more information about social media analysis.

Step 6: Write Analysis

This is ideally going to be an easy step, with all the effort you put in before. Sometimes that isn't the case though. Here's some advice:

You have a long list of themes from your analysis of the games you are studying. Go through those themes, and organize and outline them. Make sure each theme has clear connections to the pieces of evidence you are using for them, and draw out all the examples of that theme. Then begin writing out in prose form each theme into paragraphs, with those examples.

Use paratextual elements to add some extra texture to your essay. They will likely be before or after your main analysis, but can be included directly if they would fit best there. These elements make your analysis more robust and also allow some variety in what you are discussing.

You might have an impulse to speak in "review-talk", as most video game discussion and analysis you might be familiar with will come from game reviews. Don't do that. By "review-talk", I mean discussing technical details about graphics or the AI, including information about how expansive the game

is, or mentions about how exciting or scary the game is. Your goal is not to explain why the game is good or bad, but instead to write an essay on the game. Bring these concepts up if they hold clear relevance to your article, otherwise cut them. Returning to the basics of academic writing (have a thesis statement, research questions, a clear methodology) might be useful if you find yourself falling into this trap.

With that, you have hopefully successfully written out your essay! But you might not be done yet. If you find that certain aspects of the analysis feel undercooked, remember this can be an iterative process. Go back and find other games that might be interesting in conversation with your original text, search for paratexts to add more context to your analysis, replay some important sections to understand them better.

Conducting Cultural Analyses of Video Games

If a researcher is interested in understanding a video game through the lens of cultural studies, researchers should be ready to understand the context in which the game was produced, and under what circumstances it was created. What events influenced the creators? Into which cultural era did the game emerge? Were there any particular sociological factors to consider? What sort of political tensions were the topic of conversations? Basically, how did everything that is not culture itself produce this cultural product? (Shome, 2021). As Fernández-Vara (2019) wrote, "Providing the context helps us situate the game historically, culturally, socially, and economically. Video games are the product of their time, therefore, learning about the socio-cultural and industrial environment in which they were produced is crucial to understanding them" (p. 61). This sentiment is also reflected in Shaw (2010)'s work, where she

wrote, “Placing video games within larger cultural discourses is important, as video games themselves are the product of larger cultural contexts” (p. 410). Thus, while video games may seem completely divorced from the time in which they were made—for example, a game made during the height of the Iraq war may not make any explicit reference to the events of the time or feature war whatsoever—even games that are not *explicitly* about a certain cultural conjuncture are affected, as any cultural product is, and will therefore have important connections to that cultural moment (Shome, 2021).

It is important to note that an unfortunate amount of prior academic scholarship on video games treated gaming culture as distinctly separate from popular culture, which limited game studies due to (sometimes unfounded) assumptions about the medium (Shaw, 2010). Articles by both journalists and academics should center who plays video games, what they play, and how they play rather than starting from a preconceived idea of who or who isn’t a gamer or that gaming culture is somehow completely separated from culture at large (Shaw, 2010). A useful concept when considering a cultural analysis of a video game is to look for video games within culture rather than looking for culture within video games; recognizing the myriad ways that games are integrated into various parts of our daily lives is far more illuminating than setting out to study “video game culture” (Shaw, 2010).

Another important element to note for those looking to study the cultural context of a particular game is the localization of video games. Games may be developed in one country, but they are played on a global scale, and so games may be translated in ways that “[undermine] their initial intentions” (Fernández-Vara, 2019, p. 63). Researchers may also consider the ways in which paratexts interact in a cultural context with a game; paratexts are “...reviews, TV advertisements, game boxes, manuals, machinima…around the game we are analyzing are part of how the audience makes sense of it” (Fernández-Vara, 2019, p. 64). Looking at paratexts can add texture and layers to one’s analysis.

Cultural Contexts

When it comes to analyzing the cultural context of a piece, some of the main areas of focus may include:

***Internal context specific to the game*.** Knowing which aspects of the game one is studying is imperative. Is the focus of the cultural analysis an entire game? Is it a single level or quest? In what context is the segment being studied presented to the player? Researchers should situate the analysis within the context of the game itself (Fernández-Vara, 2019).

Example: An analysis of the Heart Events of Marriage Candidates within the larger context of relationship building in *Stardew Valley*; fetch quests in the context of a larger game; how *Tomb Raider*’s level design in certain instances reinforces imperialist narratives

The team behind the game. Who made the game that is being studied? Certain developers have certain reputations or a level of “brand” recognition which may influence how gamers perceive them—for example, people have an idea of what Hideo Kojima’s games look like. Analyzing this aspect of the game’s context is less about the specific individuals behind the game and their personalities (unless one is doing an analysis of how, say, someone with extreme political views has infused a game with said views) and more about “the process of how the game was made” (Fernández-Vara, 2019, p. 69). If researchers are familiar with the work of those behind the game being studied, they can engage in comparative analyses.

Example: Looking into the political leanings of developers, creatives, and others who have worked on games; finding out if games had any specific governmental funding; an analysis of how voice actor Greg Ellis' dive into the alt-right and transphobic rhetoric impacts replaying *Dragon Age: Inquisition* and romancing his character Cullen.

The genre of the game. There are certain features which particular genres have. Thinking about genre can help researchers make connections between the game they are studying and other media within the genre. Video game genres are a bit complex, since video games can be classed in several different ways (formal features, like gameplay, or narrative features might be the focus of one kind of categorization or another). There are also certain conventions that specific genres have; for example, action-adventure game protagonists (for example, explorers Nathan Drake and Lara Croft) tend to be well equipped with weapons. Different games belong to different genres in the opinions of different people, so it is important for the researcher to be clear in their own definition of the genre (Fernández-Vara, 2019). Remember that genres, like gamers, are not necessarily what one may think at first glance (Shaw, 2010) and that deeper digging may uncover more nuance.

Example: An analysis of Supermassive Games' series of horror-movie-games and how they reinforce or subvert expectations of the horror genre; an analysis of how older and newer *Tomb Raider* games have defined Lara as an action hero.

The technological context of the game. The platform upon which a game is played influences the way it is designed. It is important to clarify the game's platform, since games can be drastically different depending upon which platform they're on. Localization is also important in this context, since there may be differences across platforms. Mods, emulations, and ports will all make the experience of the game different. Developers will craft their games based on the capability of the platforms upon which they are launching their games, and so noting the potential and limits of different platforms will better equip the researcher (Fernández-Vara, 2019). For example, games on the Wii were likely to utilize unique motion controls.

Example: An analysis of a game exclusive to a now defunct gaming system or platform like the Ouya.

The economic context of the game. How is the game being studied "distributed, marketed, and monetized"? (Fernández-Vara, 2019, p. 82). Who published the game? What form does the game come in? Can it be purchased physically, electronically, in both formats? Is the game subscription based, or is it a one-time purchase? Is the developer an indie developer or do they have the budget of a bigger, AAA developer? Was it funded through Kickstarter or Patreon? Are there microtransactions? Was the game made under crunch? Were there any sort of economic elements that are key to understanding the game? All of these questions are important to consider when thinking about the economic context of the game. Things like the economy—or whatever is outside of culture—directly influence culture itself and are therefore worthy of examination (Shome, 2021).

Example: An examination of the difference between how Baldur's Gate 3 was developed vs. other games of its quality and caliber despite a smaller team and budget than a lot of other AAA studios.

The audience of the game. Developers think about the audience of their game quite intensely. Researchers may be interested in thinking about how developers attempt to appeal to their target audience, and the effects of the advertising for the game. How a game is presented, from

audio to visual cues, may be influenced by the audience for whom the developers are creating a scenario. Researchers may also consider how the intended audience may influence the more meta aspects of the game's design (Fernández-Vara, 2019). Remember, it is important to keep in mind that "gamers" are a diverse population, and thinking about them only in terms of dominant social categories ("Gamers are white, heterosexual, men…") will be quite limiting in terms of the nuance of one's research (Shaw, 2010).

Example: How LGBTQ+ gamers negotiate with representation and identification; for example, Leon Kennedy has become a sex symbol of sorts despite being presented as an action hero. This is a reinterpretation of his character by the audience.

The game's relationship to other media. Transmedia storytelling spans different mediums. For example, *The Elder Scrolls* series includes games as well as real world books that detail different aspects of the world, like flora and fauna. While looking at the ways in which different parts of different stories are presented across different mediums, it is important to remember that games are inherently unique in that they are interactive and explicitly demand action (or inaction, depending upon the narrative context) of the player. Video games may also take inspiration from or invoke other stories from different mediums (Fernández-Vara, 2019). Games may reference other mediums, but they may also reference other video games or take place in universes with pre-established rules (Fernández-Vara, 2019).

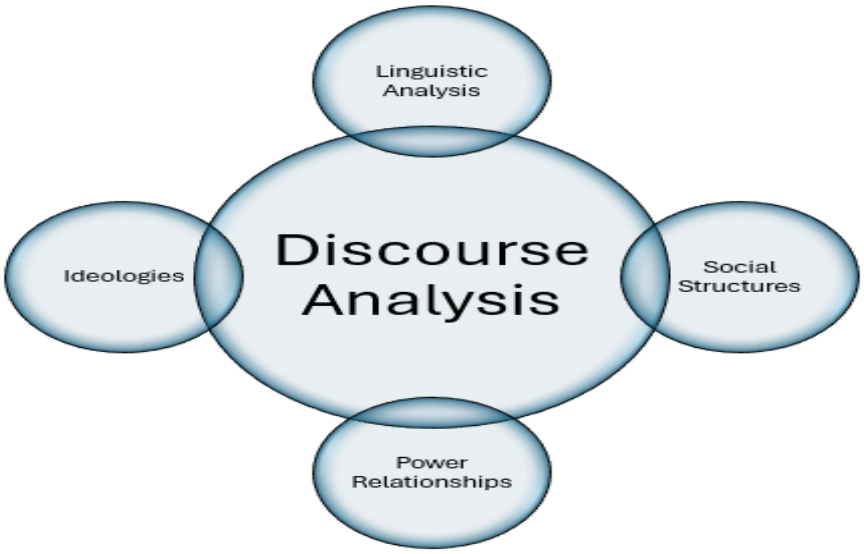
Example: The *God of War* series includes figures from both Greek and Norse mythology in different contexts. *The Sinking City* takes its inspiration and narrative cues from the work of H.P. Lovecraft. for example, the *Baldur's Gate* series utilizes the gameplay systems of the tabletop RPG Dungeons and Dragons.

The socio-historical context of the game. The time and place where a game is developed has a massive impact on it, since the culture into which games emerge influence it just as much as it influences culture (Shome, 2021). Games may or may not touch upon the events that occurred during the time of development (Fernández-Vara, 2019).

Example: Silent Hill: The Message was developed and released in an age where discussions about mental health and online activity are commonplace. How did that influence the narrative choices the developers made?

Discourse Analysis (DA)

What is discourse analysis?
Discourse analysis (DA) is a qualitative research method to figure out how language is used to produce and deliver meaning in various social settings. By paying attention to both the linguistic elements and their use in a text, discourse analysis reveals the hidden social structures, power relationships and ideologies.



Discourse analysis claims that language has political implications; it is not neutral. It actively shapes our ideas about the world and social relationships as well. Discourse analysis is a diverse research method adopted by multiple disciplines from linguistic studies to media, communication, sociology, history, and beyond.

Why do we need to study discourse?
The study of discourse is the study of meaning—both suggested meaning and inferred meaning. Discourse analysis often reveals the hidden perspectives implied in a study of language usage. It is not enough to merely read a text or hear a conversation. In other words, we study discourse to better understand our world and the practical application of language in everyday life. Through exploring how language is utilized socially, we come to recognize its varied roles, including the generation of meaning and the upkeep of specific social standards and shared knowledge (StudySmarter, n.d.).

Example: For example, when analyzing political discourse, especially between a politician and their followers, a discourse analyst would focus on several key areas to understand the nuances of power, ideology, and the achievement of social goals through verbal communication. The context (such as a public procession with media presence vs. a private meeting without media) greatly influences the nature of this communication (Voxco, n.d.).

When to use discourse analysis?
In fact, any kind of communication could use discourse analysis. Every kind of interaction between human beings, of course, includes an element of communication. In other words, anyone can use discourse analysis to pick apart not only everyday conversations but also social media interactions or interviews in order to see how language forms meaning. This understanding reveals power dynamics, and it encourages us to examine social norms in different situations.
For instance, people can study political speeches to discover the linguistic strategies and ideologies that politicians depend on. More examples of useful sources of materials for discourse analysis include newspapers, novels, conversations, song lyrics, adverts and speeches (Vaia, n.d.).

Academic as well as real-world applications of discourse analysis
Because it is interdisciplinary in nature, discourse analysis can be applied widely across fields. In sociology, it helps to unearth the norms and values of society. In politics, it assists in decoding political speeches to reveal the underlying messages and strategies. In marketing, it describes how consumers think about things. Media studies have significantly practical uses for this method: analyzing news content to show that bias exists, identifying such biases, and illustrating how language can subtly change meaning by examining what people say or write. It also has use in health care, where it can help with patient-doctor communication and ultimately help patients to be more comfortable (ATLAS.Ti., n.d.).

Key Concepts in Discourse Analysis

All sub-methods of discourse analysis, according to Gee (2011), fall within the two overarching approaches: 1) language-in-use and 2) socio-political.

1) Language-in-use (How it's used): Language-in-use approaches emphasize the linguistic application of language components, such as grammar, syntax, and phonology. They're concerned with various aspects of language use in social contexts, so they differ from purely structural analyses that treat language as an isolate (Delve & Limpaecher, 2023, November 1).

2) Socio-political (What's said): What interests socio-political approaches to discourse analysis are seeing how language affects society and discussing how language and power are related. Critical Discourse Analysis (CDA), a key method in this field, is influenced by Michel Foucault's work on power and examines how discourse reflects and shapes power dynamics. It aims to uncover hidden power structures and societal influences by analyzing language. This kind of language-based analysis also includes ethnography-based analysis and multimodal analysis, which provide various cultural and communicational perspectives. Using these many different methods, discourse can be analyzed with a view to its broader social and cultural contexts (Crosley, 2021, June 21).

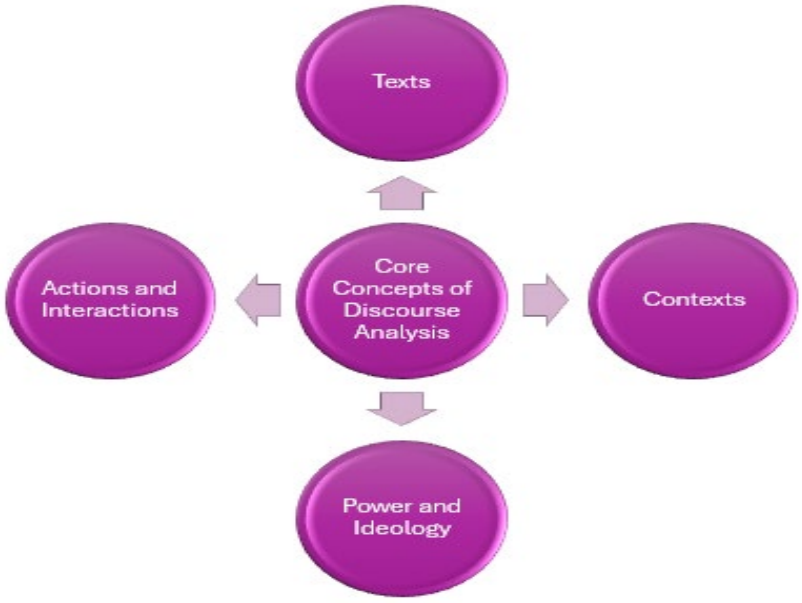
Approach	**Type**
Narrative analysis	Language-in-use
Conversation analysis	Language-in-use
Pragmatics	Language-in-use
Critical discourse analysis (CDA)	Socio-political
Foucauldian discourse analysis	Socio-political
Ethnography of communication	Socio-political
Rhetorical Analysis	Socio-political

Structure source: Crosley (2021, June 21)

Discourse analysis in the era of digitalization
According to Jones et al. (2015), discourse analysts typically focus on **FOUR** core concepts. These are:

Texts: The process in which various entextualization technologies enable the integration of semiotic components to produce socially identifiable texts and can be employed to execute various socially acknowledged actions.

Contexts: These refer to the material and social contexts in which texts are created, ingested, dealt with, and appropriated.



Actions and Interactions: The manner in which individuals interact with texts, particularly their interactions with and amongst themselves.

Power and Ideology: The ways in which individuals dominate and regulate others through the use of texts and construct particular "versions of reality."

How to Do Discourse Analysis in Media and Communication Studies

In media and communication studies, discourse analysis involves thorough examinations of elements such as language (texts, political speeches, news reporting etc.), images, and the broader context within which they are produced and consumed. It is very useful for examining how language influences knowledge, identities, and social relationships (MAXQDA, n.d.). This also enables the researcher to uncover underlying beliefs, values, and power relations that organize public discourse. Here are some practical examples of discourse analysis that could be applied in media and communication studies:

Uncovering dominant discourses and power structures
Discourse analysis is useful for making apparent the dominant discourses, ideological assumptions, and power structures that underpin various forms of media content, such as texts, political speeches, and news reporting (MAXQDA, n.d.). For example, an examination of media texts can reveal the language attitudes and the subjects that society values and provide insight into how social identity and relationships are constructed as a result.

Analyzing media discourses and identity constructions

Media discourses play a significant role in shaping public opinions and trends in media reporting. Through discourse analysis, researchers can interrogate these patterns and consider what they might mean in terms of how identities are constructed (MAXQDA, n.d.). For instance, a comparative analysis of news coverage of the Russia-Ukraine or Palestine-Israel war can show us how different media outlets presented the war in contradictory ways based on their ideologies.

Critical Discourse Analysis (CDA)

CDA is a methodology that studies the uses of language very closely to understand its deeper meanings and implications within a social context. It considers the form, structure and content of discourse within a broader frame of societal processes that guide and are guided by language (Archives, n.d.). This is a particularly useful approach to the critical analysis of media discourse and understanding its role in the reproduction and circulation of dominant ideologies (Montgomery, 1990). In other words, CDA examines the connections between language, power and ideology in media texts (Fairclough, 1989 & Crosley, 2021, June 21).

Case studies in media discourse

Case studies are a common way to apply discourse analysis in media studies. They involve a detailed investigation of several media texts- ranging from print journalism to TV and radio- to show how vocabulary and grammatical system can further understanding of ideological underpinnings (Montgomery, 1990). For example, a detailed study of a genre from popular daytime radio might reveal how texts construct relations between participants and audience.

Implications for social media studies and online communication

Social media: In the era of social media, discourse analysis can be applied to study phenomena such as disinformation and the processes by which credibility is built, political narratives are formed, power relations are established and how platform designs influence discourse.

Online Communication: A researcher can analyze the language of online interactions (such as Facebook comments, tweets, YouTube comments, etc.) in order to study power dynamics and the construction of social norms.

A Step-by-Step Guide to Discourse Analysis

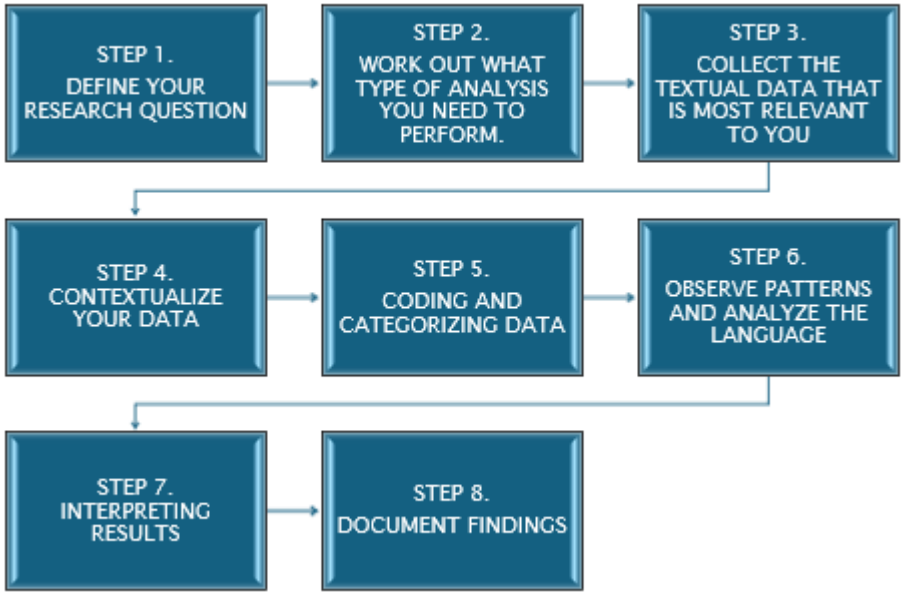


Fig: Steps of Discourse Analysis

Step 1: Define your research question
Start by clearly defining your research question(s) to guide your analysis. For example, “How do political speeches use language to influence public opinion?”

Step 2: Work out what type of analysis you need to perform
Do you want to examine the language on its own? Do you want to look at how language interacts with other elements of the text? Or do you want to analyze how the text is performing in context? Choose an approach that corresponds to your research question. For example, in media studies, you might select Critical Discourse Analysis (CDA) to explore power relations, Narrative Analysis to look at storytelling, and a Semiotic Approach to interpreting the underlying meanings of the media texts (Delve & Limpaecher, 2023, November 1 and Bachelorprint, n.d.).

Step 3: Collect the textual data that is most relevant to you
Collect data that corresponds as closely as possible to your research question. This can comprise a range of media texts, e.g., newspaper articles, social media posts, television programs, interviews on hand, and political speeches.

Step 4: Contextualize your data
You need to consider the context in which those words are used, including the people who are using them, how specific of a role they may be playing, and whether their speaking style could have a bearing on society. This is a crucial step to understanding meaning within its natural context (Bachelorprint, n.d.).

Step 5: Coding and categorizing data
Use qualitative data analysis software (see more detail about using QualCoder below) to code your data by picking out themes, categories, or concepts. For instance, if you were looking at a political speech, you could divide the data into several categories based on common themes, such as persuasive language, metaphors and argumentative structures that may shape public opinion. This way, you could easily find all the statements related to each theme. Also, ensure that the themes are associated with your study question(s).
If you use software like MAXQDA, ATLAS.ti, NVivo, or QualCoder (free and open source) for this task, you can import your data and start coding by identifying themes, categories, or concepts from the data. To ensure that your analysis is structured and consistent, create a codebook (Bachelorprint, n.d. & MAXQDA, n.d.).

Step 6: Observe patterns and analyze the language
Analyze the coded data for patterns and themes, taking note of frequently occurring codes and relationships between different themes. Also, pay attention to vocabulary, syntax, and nonverbal interaction (Luo, 2019, August 23; Bachelorprint, n.d.; and MAXQDA, n.d.).

Step 7: Interpreting results
Interpret your results in relation to your research question. This involves explaining how the discourse explains the problem being studied. This means taking into account the complexities and contradictions inherent in the data. Make sure you back up your views with evidence (Archives, n.d. & Bachelorprint, n.d.).

Step 8: Document findings
End your analysis by summarizing your findings and relating them to your original research problem. Suggest future research based on the findings (Bachelorprint, n.d. and Delve & Limpaecher, 2023, November 1).

Example: **Discourse Analysis of Political Speeches**
Research question: "How do political speeches use language to influence public opinion?" **Approach:** Narrative analysis of the speeches to look at how they shape public opinion/voters. **Data collection:** Collect transcripts of political speeches. **Contextualization**: Consider the contexts of the political speeches. **Coding:** Identify phrases that convey attitudes or address the audience in some way. Or transform political speeches into a form where you can more easily analyze the use of persuasive language, metaphors, and argumentative structures that shape public opinion. **Pattern and language analysis:** Uncover the commonly used rhetorical devices that politicians employ to persuade, involve, and influence the public. These (rhetorical) devices can be techniques that speakers use to enhance their arguments, take a more compelling stand, and communicate their ideas more effectively. By comparing political speeches, one can identify patterns in how politicians structure their discourse, the types of appeals they make (e.g., emotional, logical, ethical), and the specific language features they employ. **Interpretation:** Determine how language choices construct political identities and persuade public opinion/voters. **Document Findings:** End your analysis by summarizing your findings.

Content Analysis

Content analysis is a prevalent research methodology utilized across diverse disciplines to examine textual, visual, or audio content systematically. It facilitates the generation of replicable and valid inferences regarding the contextual utilization of texts (Krippendorff, 2018). Researchers employ content analysis to discern and document the attitudes, perspectives, and interests of individuals, small groups, or large cultural cohorts (Dirsko, 2016). This method encompasses two primary approaches: Basic and Interpretative. Basic content analysis employs quantitative techniques, such as word counts, to analyze data, whereas interpretative content analysis focuses on qualitatively inferring specific message characteristics through objective and systematic identification (Dirsko, 2016). Consequently, content analysis emerges as a versatile and robust research methodology with widespread applications across disciplines. Systematic scrutinizing communication content facilitates highlighting patterns, trends, and relationships within data, informing decision-making processes and enriching comprehension of human communication behavior.

Content Analysis in Media and Communication Studies

Content analysis is a robust method for scrutinizing various forms of media content, including news articles, television programs, social media posts, and advertising materials. This methodology empowers researchers to discern patterns, themes, and underlying messages within media content, offering valuable insights into the construction and dissemination of information within society (Neuendorf, 2016). For instance, scholars have employed content analysis to explore the depiction of gender roles in advertising (Goffman, 1979), the framing of environmental issues in news coverage (Boykoff, 2007), and the portrayal of race and ethnicity in popular media (Entman & Rojecki, 2001). Through systematic examination of media texts, content analysis unveils implicit biases, ideological frameworks, and cultural representations embedded within media content. Moreover, this method enables researchers to investigate the prevalence of stereotypes, tropes, and stigmatizing representations in media content, thus offering crucial insights into the societal impact of media narratives.

A step-by-step approach to content analysis in media studies

Content analysis involves systematic and impartial scrutiny of communication content to uncover explicit and implicit meanings inherent in the data. Its primary objective is to attain objective comprehension and foster knowledge advancement. This methodology generally encompasses several essential steps, and the following considerations are noteworthy for conducting content analysis effectively:

Step 1: Define Research Objectives and Questions
Clearly articulate the goals of your content analysis. What specific aspects of media content are you interested in? Develop research questions or hypotheses to guide your analysis. This step is crucial for setting the scope and focus of your study (Krippendorff, 2018).

Step 2: Select a Representative Sample
Choose a sample of media content representative of the broader population or specific media sources under investigation. The selection should reflect the diversity and variety within the media landscape (Neuendorf, 2016).

Step 3: Define the Unit of Analysis
Determine the unit of analysis, which could be a word, phrase, sentence, image, or any other meaningful unit within the media content. This choice depends on your research objectives and the nature of the content (Holsti, 1969).

Step 4: Develop a Coding Scheme
Create a coding scheme to categorize the content systematically. Identify key concepts, themes, or variables that align with your research objectives. Develop a set of codes to represent these elements, ensuring they are clear, mutually exclusive, and exhaustive (Weber, 1990).

Step 5: Train Coders
If multiple coders are involved, provide training to ensure consistency in applying the coding scheme. Conduct pilot tests to refine the coding instructions and address any ambiguities or challenges that may arise during the coding process (Lombard et al., 2002).

Step 6: Coding Process
Apply the coding scheme systematically to the media content. Code each unit of analysis according to the established criteria. Document the coding process and maintain consistency among coders through regular meetings and discussions (Krippendorff, 2018).

Step 7: Data Analysis
Analyze the coded data using appropriate techniques. This may involve quantitative analysis (e.g., frequency counts, statistical tests) and/or qualitative analysis (e.g., thematic analysis). Explore patterns, trends, and relationships within the content (Neuendorf, 2016)

Step 8: Interpretation and Reporting
Interpret the findings to ensure they are in line with the research objectives. Report the results clearly and concisely, providing insights into the patterns observed in the media content. Relate your findings to the broader literature and theoretical frameworks (Krippendorff, 2018).

By following the aforementioned step-by-step approach, researchers in media studies can conduct a rigorous and systematic content analysis that provides valuable insights into the dynamics of media content and its implications for society.

Applications of Content Analysis

With wide-ranging applications in media and communication studies, content analysis enables the examination of shifts in media content across temporal dimensions, scrutinizing issue framing within news narratives and evaluating how marginalized communities are depicted in entertainment media (Krippendorff, 2018). Moreover, content analysis is invaluable for investigating digital media's influence, encompassing studies on the propagation of misinformation, the virality of content, and the portrayal of social movements within online domains. Its diverse applications span across various academic disciplines, including but not limited to:

- Media Studies: Content analysis is commonly used in media studies to analyze the portrayal of certain groups or topics in media content, examine media framing, and assess media bias.

- Communication Research: Content analysis is employed in communication research to analyze communication patterns, message content, and the effects of communication on individuals and society.
- Marketing and Advertising: Content analysis is used in marketing and advertising research to analyze advertising messages, consumer feedback, and trends in consumer preferences.
- Political Science: Content analysis is utilized in political science to analyze political speeches, media coverage of political events, and public opinion expressed in social media and online forums.
- Health Communication: Content analysis is applied in health communication research to analyze health-related messages in the media, public health campaigns, and health information dissemination.

The points mentioned above highlight that content analysis transcends the confines of media and communication studies, exhibiting its applicability across various fields as required.

Implications of Content Analysis

The implications of content analysis are multifaceted, extending its contributions to academic research and practical applications across diverse professional domains. It facilitates empirical inquiry, theoretical advancement, evidence-based decision-making, and strategic planning across various disciplines. Academically, content analysis serves as a robust methodological tool for systematically and objectively examining and interpreting textual, visual, or audio data. Researchers from media studies, sociology, psychology, political science, and marketing utilize content analysis to explore patterns, themes, and trends within communication content.

Gauging Audience Perception: Content analysis facilitates the exploration of audience perception by examining the context surrounding the text and considering factors such as the source of the content, the intended audience, and any cultural or socio-political influences that may shape interpretation (Weber, 1990). Example: A political campaign team could conduct content analysis to gauge how different demographic groups perceive policy proposals and what influences them most by analyzing the language and interactions of various audience segments.

Monitoring Trends and Changes: Content analysis facilitates monitoring changes in communication patterns over time, providing valuable information regarding societal trends and shifts in public discourse. Example: A research institute can conduct content analysis of public discourse on climate change over a decade, tracking changes in language use and narrative framing. By analyzing shifts in communication patterns, researchers can identify emerging trends in public attitudes toward climate change, informing policy discussions and public awareness campaigns to address environmental issues more effectively.

Identifying Bias and Stereotypes: Content analysis identifies bias, stereotypes, and misrepresentations within media content, fostering more balanced and accurate portrayals of individuals and groups. Example: A content analysis of news articles covering a high-profile court case can reveal biases in the language used to describe the defendant based on race and socioeconomic status. By identifying and addressing these biases, journalists can provide more balanced and accurate coverage, avoiding perpetuating stereotypes and misrepresentations.

Insight Generation: Content analysis yields insights into communication content, facilitating the identification of patterns, trends, and relationships that may need to be discernible through other methodologies. For example, by conducting social media sentiment analysis about a particular product, content analysis could generate insight that reveals a recurring pattern of sentiment associated with customer satisfaction with the product.

Evidence-Based Decision Making: Content analysis can provide empirical evidence to inform decision-making processes across diverse fields, including media production, marketing strategy development, and policy formulation. For example, in policy formation, a think-tank can use content analysis to discuss education policy by analyzing students', parents', and teachers' surveys to let decision-makers see parallel information that provides nuanced empirical evidence to finetune policies.

In short, content analysis provides significant implications for research and practice, facilitating a nuanced comprehension of communication phenomena and guiding decision-making across diverse domains. However, it exhibits strengths and weaknesses like any research method. The pros and cons can be summarized as follows:
Pros and cons of the Content Analysis research method:

Pros of Content Analysis:	**Cons of Content Analysis:**
Objectivity: Content analysis offers an objective approach to studying communication content, as it relies on systematic and standardized procedures for data collection and analysis that enhance the reliability and replicability of research findings (Weber, 1990).	**Subjectivity in Coding:** Despite efforts to standardize coding procedures, content analysis still involves subjective judgment in interpreting and coding communication content that can introduce bias and affect the reliability of research findings (Weber, 1990).
Versatility: Content analysis can be applied to various forms of media content, including textual, visual, and audio materials. This versatility allows researchers to analyze multiple communication artifacts across different contexts and platforms (Neuendorf, 2002).	**Limited Contextual Understanding:**Content analysis focuses on the explicit content of communication artifacts, often overlooking the broader context in which they are produced and consumed, which may lead to an incomplete understanding of the social, cultural, and historical factors influencing communication (Neuendorf, 2002).

Efficiency: Content analysis enables researchers to analyze large volumes of data efficiently, making it suitable for studying extensive archives of media content or conducting longitudinal studies over time (Krippendorff, 2018).	**Difficulty in Quantifying Qualitative Data:**Content analysis often involves analyzing qualitative data, which can be challenging to quantify and measure objectively, which may limit the statistical rigor of content analysis studies compared to quantitative research methods (Krippendorff, 2018).
Depth of Analysis: Content analysis facilitates in-depth exploration of communication content, allowing researchers to uncover underlying themes, patterns, and meanings within the data that provide rich insights into complex communication phenomena (Berelson, 1952).	**Time-Intensive Nature:** Conducting content analysis research can be time-consuming, especially when analyzing large datasets or complex communication content, which may pose practical challenges for researchers with limited resources or deadlines to meet (Berelson, 1952).

Nevertheless, content analysis' strength in media and communication studies emanates from its ability to provide systematic and objective insights into the content of media messages. By applying rigorous coding and categorization schemes, researchers can systematically analyze large volumes of media content, enabling the identification of recurring themes, linguistic patterns, and visual representations within the media. This approach allows researchers to uncover implicit meanings and underlying messages within media content, providing valuable insights into how media messages are constructed and disseminated. Additionally, content analysis allows for examining changes in media content over time, facilitating longitudinal studies that track shifts in media representation, language use, and narrative framing. A longitudinal perspective is valuable in understanding how media representations of social issues, events, and marginalized groups evolve, shedding light on the dynamics of media discourse and the impact of broader social and cultural changes on media content. Moreover, content analysis in media and communication studies enables researchers to compare and contrast media content across different media sources, genres, or cultural contexts. This comparative approach can reveal variations in the portrayal of specific topics or the framing of news events across various media outlets, providing insights into the diversity of media representations and the media's role in shaping public perceptions and attitudes.

It is, therefore, safe to presume that content analysis is a valuable method in media and communication studies that offers systematic insights into media content, structure, and meaning. Through rigorous coding and analysis techniques, content analysis allows researchers to uncover patterns, themes, and implicit meanings within media content, providing valuable insights into how media construct and disseminate information. As media and communication studies evolve, content analysis remains a powerful and versatile tool to research and shed light on media's role in shaping public discourse, attitudes, and cultural representations.

Historical Analysis for Media and Communication Research

Historical research is an area of qualitative research that concerns subjects or events of the past and exists across various disciplines. In the field of media and communications studies, historical scholarship may investigate the past production of specific media or interrogate the entire history of media as a whole. When conducting historical research, a researcher may utilize various historical approaches for fact finding including textual analysis, institutional history, biography, policy history, and historical analysis (Hampton, 2014).

Historical analysis is a qualitative research methodology that can be applied when phenomena that one seeks to research has occurred in the past. It also serves as an effective methodology to employ when an individual whom a researcher wishes to study is inaccessible for a myriad of reasons. In both scenarios, the remnants that people have left behind or historical information that has been archived, possess great significance and can be explored and examined through historical analysis. These artifacts may be physical in nature such as documents, newspapers, books, photographs, artwork, furniture, etc. In today's digital world, media scholars can acquire electronic media to examine and understand the historical past of a subject of inquiry.

Historical Analysis Theoretical Framework

It is common for historians to omit theoretical discussions from their writings to avoid interfering with the narrative flow of the story that is told; however, theory plays an important role in electronic media research history (Godfrey, 2006). Media and communication researchers that utilize historical analysis methodology tend to draw from the critical cultural studies theoretical framework to analyze historical events and interpret their importance. Acting as a critical theorist enables the researcher to evaluate the elements of societal power and influence that the economic and political elites have in the Western culture of electronic media history (Godfrey, 2006). This leads to the uncovering of meanings amongst people and new understandings of significance and representation embedded in electronic media historical evidence.

Historical Analysis Process

Godfrey (2006) identifies a general framework for the historical process which includes the following five steps:

- Identify the general topic of interest
- Submerge yourself in the literature and the context of the time period
- The process of discovery involves uncovering the primary evidence that portrays your story
- Analyze the evidence
- Provide supportive evidence wherever the mediated sources may be called into question by the skeptics of media as evidence
- How to Perform Historical Analysis

Step 1: Identify the general topic of interest

While it is not a requirement to detail the specific research questions before diving into historical analysis research, having a general subject of interest and understanding its significance is necessary. Many projects that use historical analysis as a research methodology focus on specific people, events, time periods, or issues of the past contrasted with present narratives to explain human phenomena (Brennen, 2017). Media and communications researchers may

choose to study objects of culture and art, compare different societies or development in human thought, investigate the rhetoric of kings, presidents, or industry leaders, or center their topics around subjects such as journalism history or media history or (Brennen, 2017).

Step 2: Submerge yourself in the literature and the context of the time period

After selecting the topic of interest, it is important for qualitative researchers to source relevant resources and gather all the information that is available related to the subject (Brennen, 2017). The materials collected give insight into the available evidence and form the basis of the literature review for the project. It is imperative to focus the research on resources pertaining to the appropriate historical setting and time period of the phenomena being studied. Godfrey (2006) outlines the below tips that are helpful to keep in mind:

- Examine what has been written
- Look for possible primary sources
- Focus your purpose within the body of literature
- Create a purpose that adds to new knowledge

Step 3: The process of discovery involves uncovering the primary evidence that portrays your story

Upon conclusion of data collection, sort the available evidence into categories to narrow it down to the main pieces of information best needed to convey the underlying story of the research project. Pay special attention to evidence that shed light upon the cause and effect of the occurrence. The following examples provided by Godfrey (2006) identify the variations in primary versus secondary source materials:

Subject	**Primary Sources**	**Secondary Sources**
Event	Recording of live event	Edited recordings describing event
Experiment	Personal observations, artifacts	Quoting observations of others
Demonstration	Live recording, planning records	Graphically altered/staged photo
Life story	Diaries, letters, personal papers	Book about the person
Television program	Annotated director's script	Critic's review of the program
Television movie	Production meeting minutes	Public relations release

Step 4: Analyze the evidence

Despite the medium, all documented evidence selected during data collection must be evaluated for authenticity and reliability, as the researcher will analyze and interpret its significance and meaning to tell the story of their findings (Brennen, 2017). Thoroughly review media artifacts for legitimacy and refer to the below points of important consideration during analysis as offered by Godfrey (2006):

- Weigh the evidence against the tests of authenticity
- Examine collaborative, contradictory, and physical evidence
- Unravel the layers of that creative process in broadcasting and media to assure the primary evidence is valid

- Pay particular attention to visual and aural evidence and need for verification and/or support

Step 5: Provide supportive evidence wherever the mediated sources may be called into question by the skeptics of media as evidence

In the early days of electronic media history, evidence in the form of digital media were not viewed as genuine research tools (Godfrey, 2006). While this line of thinking may not be common today, it is best practice for media and communication scholars to properly identify and document all evidence to explain its significance and provide justification for usage in the research project (Peck, 2020). Organization is key throughout the research process and maintaining accurate documentation, which includes noting the authors and dates and summarizing the purpose and main idea of historical documents, provides transparency should any piece of evidence be called into question.

Examples:

The following summary of historical research case studies in media and communication utilized historical analysis methodology and have become published books:

Hajkowski, T. (2010). *The BBC and national identity in Britain, 1922–1953.* Manchester, UK: Manchester University Press.

> Hajkowski (2010) examines British national identity and representation in radio broadcasting news and creative programming during the twentieth century through a cultural and historical lens of mass media and media history theories.

Potter, S. J. (2003). *News and the British world: The emergence of an imperial press system.* Oxford, UK: Oxford University Press.

> Potter (2003) studies the development and impacts of the imperial press system that drew together Britain, South Africa, and other countries during the nineteenth and twentieth centuries by examining debates during historic wars that occurred in the associated countries.

Webster, W. (2005). *Englishness and empire, 1939–1965*. Oxford, UK: Oxford University Press.

> Webster (2005) investigates the effects that the loss of imperial power had on English culture, legacy, and identity during the late twentieth century through extensive research in media archives based on popular narratives of nationhood, race, and immigration.

Zacher, D. (2008). *The Scripps newspapers go to war.* Urbana, IL: University of Illinois Press.

> Zacher (2008) examines a prominent national newspaper and news syndication media organization that existed prior to the radio and television networks during World War I to express how the United States government and elite forces influenced the information that was covered.

Special Considerations for Researching Historical Electronic Media

Regarding researching electronic media, historical analysis can be used to source media created via tape or digital mediums in the forms of first-person television news or video documentary interviews, photographic evidence from events, or electronic transcripts from archived radio show broadcasts. Prior to beginning the electronic media research process, it is important to familiarize oneself with specific techniques to evaluate the legitimacy and overall audio or video resolution quality of the materials for examination. This may require appropriate training in interpreting and understanding visual language for truth discernment (Godfrey, 2006). For additional information concerning, please refer to the section detailing visual images research on social media.

Historical Research Facilities and Archives

Local city libraries, state municipal archives, and federal government repositories such as The Library of Congress, the Smithsonian Archives, and the U. S. National Archives and Records Administration are accessible sources that house large volumes of historical electronic media for public research. For more information concerning these data repositories and their access parameters, as well as locating additional archives, researchers can refer to the National Union Catalog of Manuscript Collections (NUCMC) resource guide maintained by the Library of Congress (Godfrey, 2006). It is located online at https://www.loc.gov/coll/nucmc/. There are also nonprofit, commercial, private, and private collections of record archives throughout the country that may be accessible via formal written request. While access to historical archives may be abundantly available, historical analysis of electronic media materials can pose methodological challenges for media scholars (Godfrey, 2006).

Historical Analysis Challenges

Historical analysis may pose methodological challenges during research. Firstly, the researcher may incur monetary costs if extensive travel to multiple archival sites is needed, or if admittance or print fees are required for collecting material. These potential hindrances should be heavily considered by the researcher.

Secondly, while the digitization of media expands the possibilities for research through data mining, uneven digitization of data may distort the historical record. To combat this, the researcher may want to cross reference digital records directly with physical media when available. The researcher should also avoid taking digital articles out of context when interpreting the content, which can occur if solely focusing on keywords that have been used to locate online articles (Hampton, 2014).

Thirdly, access challenges may exist concerning archival material located at commercial institutions and special collections of research facilities. Prior to visiting an archive, the researcher should review all access procedures in advance. Some organizations manage access to their company's records on a limited basis and are unable to accommodate many requests. In other cases, archived materials may be externally stored within an off-site warehouse requiring ample time for retrieval (Hampton, 2014).

NVivo and Historical Analysis

Qualitative data analysis software such as NVivo may be helpful for media and communication researchers who employ the historical analysis process and amass large amounts of data.

While there are few scholarly resources pertaining to this subject specifically, an online search found general user feedback regarding the usage of NVivo for researchers working with oral history data. Pros of the software include its ability to transcribe oral history interviews and accept different forms of historical and biographical documents. It enables internal file organization, coding and note assignment, and incorporates functionality for data visualization. Reported cons of the software indicate that it is not as appropriate for historians in comparison to QDA Miner and the program has the tendency to freeze, crash, and stall when there is too much data input (Bradley, 2012). For additional information concerning NVivo and other qualitative data analysis software, refer to the comparative chart section of this manual.

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Chapter 5: Human-Based Methods

Interviews

This section will provide a detailed explanation of interviews as a research method, including when and how to use them to capture lived experiences effectively. Interviews are “focused, purposeful conversation[s] between two or more people” (Brennen, 2017, p. 28). Think of interviews as storytelling sessions. In qualitative research, conducting an interview is akin to inviting someone to share their story with you. It's less about ticking off boxes on a questionnaire and more about embarking on a journey together, where the paths of understanding, emotion, and insight intersect. It allows researchers to delve deeply into the subjective experiences of participants, capturing the essence of their perspectives, challenges, and triumphs.

Interviews can vary in length, time, and venue (ie. in person, via email, via video technology, etc). This section focuses on **qualitative interviews**, but other interviews include **group interviews, or focus groups**, which can provide a lot of information without being too financially costly, and **oral history,** which uses unstructured interviews to compile the life history of an individual (Brennen, 2017). There are three main types of interviews, including **structured, semi-structured, and unstructured**, open ended conversations. We discuss these different types of interviews in more detail later.

Before conducting an interview, it is crucial to ask yourself, "Is an interview the best method for collecting my data?" To help you determine this, we will first consider some scenarios in which interviewing individuals may be the most effective way to gather your data:

- Use interviews when you want to dive deep into personal stories. Interviews are perfect for getting to the heart of people's experiences, thoughts, and feelings. They let you explore the unique journeys individuals have gone through, shedding light on their perspectives in a way no survey can (Seidman, 2013).

- Use interviews when you're curious about cultural insights. If you're looking to understand the nuances of cultural practices, social norms, or community dynamics, interviews can be your window into this world. They offer a rich, detailed view of how culture shapes people's lives (Guest, Namey, & Mitchell, 2013).

- Use interviews when you're exploring why people do what they do. When the motivations behind actions or decisions are complex and layered, interviews can help unravel these mysteries. They provide a direct route to understanding the thoughts and emotions driving people's behaviors (DiCicco-Bloom & Crabtree, 2006).

- Use interviews when you're building or refining theories. If your research aims to develop new theories or refine existing ones, interviews can offer the nuanced data needed to support your theoretical framework. They allow you to gather detailed evidence and identify emerging patterns that contribute to theory building (Corbin & Strauss, 2014).

- Use interviews when tackling sensitive or under-researched topics. For subjects that are delicate, controversial, or not well-documented, interviews can be a way to gather in-depth insights respectfully and empathetically. They provide a safe space for participants

to share their experiences on topics that might be difficult to discuss in other formats (Lee, 1993).

- Use interviews when you want to validate other findings. Interviews can complement other research methods beautifully, offering a way to confirm or enrich findings from surveys, observations, or secondary analyses. They add a layer of depth and personal insight that enhances the overall understanding of your research (Creswell & Creswell, 2017).

Remember, interviews are not just about asking questions; they're about listening, understanding, and connecting with people on a level that other methods can't reach. They bring a human touch to research, opening up a world of personal insights and deep, meaningful stories. Interviews serve as a bridge to deeply understanding individuals' lived experiences, particularly when navigating sensitive topics. This method emphasizes an empathetic, ethical approach, focusing on the mutual construction of meaning between researcher and participant. It allows for the exploration of personal narratives, emotions, and motivations, making interviews invaluable for uncovering insights into complex, often hard-to-access phenomena. Interviews are not just about gathering data; they are about connecting on a human level, respecting the dignity and emotional well-being of participants, and acknowledging the intricacies of human experience (Melville& Darren, 2020; Tracy, 2019)

The Value of Interviews in Qualitative Research

At the heart of this exploration are qualitative interviews, a method that offers profound insights into the thoughts, feelings, motivations, and behaviors of individuals. These interviews are invaluable because they allow us to delve deeply into the complexities of human life, providing a nuanced understanding that quantitative methods cannot achieve (Patton, 2015). Qualitative interviews are “less concerned with data collection and instead strive to understand the context and meanings of the information, opinions, and interests mentioned by each interviewees…[they] explore respondents’ feelings, emotions, experiences, and values within their [own lives]” (Brennen, 2017, p. 29).

Imagine embarking on a journey to uncover the stories and perspectives that lie beneath the surface of everyday life. Qualitative interviews offer us this unique opportunity, serving as a window into the lived realities of participants.

Through open-ended questions, we invite individuals to share their experiences in their own words, revealing the meanings they ascribe to their actions and beliefs. This direct insight is essential for comprehending the why and how behind human behavior, allowing us to capture the essence of the human condition (Rubin & Rubin, 2012).

One of the most compelling aspects of qualitative interviews is their inherent flexibility. This method allows us to adapt our inquiries based on the flow of the conversation, pursuing emerging themes and probing deeper into areas of interest. Such adaptability is vital, enabling us to explore the complexity of human experience without the constraints of predefined responses, thereby uncovering richer, more detailed insights (Kvale & Brinkmann, 2009).

At the core of a successful qualitative interview is the rapport established between the researcher and the participant. Building trust and ensuring a respectful and empathetic interview environment are pivotal, as they facilitate the sharing of personal, sometimes sensitive,

experiences. This relational depth transforms the interview from a simple conversation into a profound source of knowledge, enriching our academic endeavors with meaningful insights (Seidman, 2013).

Most qualitative interviews are face to face, and generally, it's recommended that researchers stick to that format. Certain restrictions (like Twitter's character limits, for example) may hinder the interview process; other forms of interviewing may disallow the researcher from picking up on nonverbal social cues. It is also more difficult to clarify meaning over text, and humor or sarcasm can be lost. Since people speak in shorthand on social media, they may also do so during an interview via social media (Brennen, 2017). When one cannot do face-to-face interviews, platforms like FaceTime or Skype may make it easier to maintain a sense of intimacy. Telephone interviews may also be a worthwhile option, especially for interviews with subjects from marginalized backgrounds or who have been through trauma that makes face to face conversations more difficult (Brennen, 2017). In the following sections, we review different types of interviews and different interview formats like Skype and email. We also discuss how to conduct interviews and how to handle sensitive topics.

Type of Interviews

Type of Interview	Definition	Examples	Unique Characteristics
Ethnographic Interviews	Informal conversational interviews that are emergent and spontaneous, occurring in the field.	Riforgiate (2008) asking about work-life balance during home parties.	Occurs in natural settings, sounds casual but is instigated by the researcher.
Informant Interviews	Interviews with participants who are experienced, can articulate well, and are open to providing information.	Lindemann (2010) with disabled rugby players.	Requires building a long-term relationship, participants are deeply knowledgeable.
Respondent Interviews	Conducted among social actors with similar experiences relevant to the research goals.	Montoya (2012) interviewing Latino male entrepreneurs.	Participants speak primarily for themselves about their own motivations and experiences.
Narrative Interviews	Open-ended, relatively unstructured interviews encouraging participants to tell stories.	Davis (2007) interviewing Black women about the 1921 Tulsa Race Riot.	Focus on storytelling, can be used to reconstruct history or personal life stories.
Life-Story Interviews	Elicit stories about the interviewee's entire life, memories, and messages they wish to convey.	Oleson (2004) examining serial killers' life-stories.	Provides a comprehensive view of a person's life, can generate empathy and understanding.
Discursive Interviews	Examines how interviewees' answers are influenced by discourses and power relations.	Rivera & Tracy (2012) on Hispanic border patrol agents' views on undocumented immigrants.	Focuses on the influence of societal structures and discourses on participants' answers.

Interviews Via Video Calls

Based on the meditations of 45 student researchers, Seitz (2015) described the sort of challenges that may arise when conducting interviews via video internet technologies, specifically Skype.

Video interviews may be a more viable option for researchers than face-to-face or telephone interviews; video interviews allow a level of flexibility that others do not. Seitz (2015) noted that Skype interviews save time and money, opens up more access to more participants, and can be better when it comes to scheduling or everyday interference with the project. There is also a level of intimacy when on a video call that is not present for telephone interviews. Participants may also feel less pressured than they would in person.

The major disadvantages of Skype, or any video software, when it comes to qualitative interviews, include dropped calls and pauses, inaudible audio, inability to register body language or non-verbal cues, and a lessened sense of intimacy compared to in-person interviews (Seitz, 2015).

While Skype and other video services can be helpful, not everyone has access to these resources or feels comfortable using them. One can certainly form strong and good research relationships on Skype; Steiz (2015) noted, that researchers and participants looking to facilitate a good interview should develop a pre-interview checklist wherein they ensure they have a proper connection to the internet, an undistracting environment in which to talk, slowing down and clarifying any questions or confusion, repeating answers and questions (if necessary), and taking into consideration nonverbal social cues. Whether or not Skype or a video platform is appropriate for one's own research depends upon what the researcher is investigating. More research into video platforms for interviewing should certainly be developed.

Online & Asynchronous Interviews: Important Considerations

Several scholars have discussed how synchronous interviewing via the Internet (in focus groups, chat rooms, or online conferences) offer rich data, but asynchronous forms of interviewing are also an option. James and Busher (2006) focus on using email, but the considerations they bring to the table also apply to other asynchronous forms of communication like texting or messaging via platforms like Discord.

The two major ethical considerations upon which James and Busher (2006) reflected are establishing credibility and ensuring that participants are able to be authentic in light of the power imbalance between interviewer and interviewee.

Researchers conducting interviews via text (whether through email or other means) should look to face-to-face interview techniques as models on how to better gain consent, guarantee confidentiality, and gather data through open-ended questions that facilitate better discussions (Chen & Hinton, 1999, as cited in James & Busher, 2006). Interviewing people via text exchanges offers the opportunity for participants to "explore and revisit their insights…move back and forth through their narratives, thinking about responses, drafting and redrafting what they want to write" (James & Busher, 2006). Email and textual exchanges also allow researchers to better interview participants at the level of the individual.

Advantages and Disadvantages of Email Based Research

According to James & Busher (2006), advantages of email based research include:

- Participants can control when they can respond
- Participants can provide more thoughtful and reflective answers

According to James & Busher (2006), disadvantages of email based research include:

- Difficulty in timing and clarity due to temporal gaps between responses
- Loss of coherence due to questions administered one at a time
- Concerns about unpredictable questions
- Distractions & disturbances due to everyday life → this can result in delays in the project's timeline

Asynchronous interviews can allow participants to be involved who may otherwise be missed. The visible and constant record of emails may enable participants to "revisit issues that…slipped temporarily out of view through the course of their interviews' ' (James & Busher, 2006). The iterative process also allowed people to provide better, more detailed answers. Email can offer participants control in ways other interview methods cannot. Interpersonal relationships are quite important as they may influence the answers participants provide. Researchers must consider "the extent to which it is possible to build collaborative conversations and trust, allowing participants to feel able to explore topics in depth, when many of the normal social signal systems are absent" (James & Busher, 2006, p. 417). This is a balancing act, and there is no simple answer.

James and Busher (2006) encourage those looking to conduct email interviews to adapt traditional and conventional approaches to interviews. Constructing clear rubrics and guides can help participants and researchers alike when it comes to clarifying sources of confusion. Email interviews (or interviews via digital textual communication) can be really useful when researchers cannot do face-to-face interviews and have some time to more thoroughly explore a particular issue.

Interviews Covering Sensitive Topics

When it comes to exploring sensitive topics or conducting interviews with minority groups, it's crucial to approach these tasks with care. Conducting qualitative interviews on sensitive topics requires careful consideration of ethical, methodological, and emotional aspects to protect participants and ensure the integrity of the research. Sensitive topics are those that may trigger strong emotional responses or are private, stigmatized, or taboo, potentially causing distress for participants (Dickson-Swift et al., 2007; Liamputtong, 2007). These topics often involve personal, intimate experiences, such as health issues, violence, illegal activities, or sexual behaviors, which can be challenging for both participants and researchers.

The sensitivity of a topic can also be influenced by cultural, social, and individual factors, which means that what is considered sensitive can vary widely among different populations and even within the same community. This variability necessitates a flexible and responsive approach to research design and implementation, ensuring that the methodologies and ethical considerations are tailored to the specific context and needs of the participants involved (Liamputtong, 2007).

The importance of researching sensitive topics in media and communication lies in the potential to uncover deep insights into human experiences, societal structures, and the ways in which media narratives and communication practices influence, and are influenced by, these sensitive areas. Exploring these topics can contribute to a more nuanced understanding of complex social issues, promote empathy and awareness, and inform policy, practice, and societal discourse.

When planning and conducting interviews on sensitive topics, researchers must prioritize the needs of study participants while also providing clear guidance for ethical and effective research practices. A framework developed by Dempsey et al. (2016) emphasizes essential elements in qualitative interviewing, especially when engaging with vulnerable groups. This framework outlines the importance of preparing for interviews, managing interactions with gatekeepers, considering the timing and location of interviews, building trusting relationships, ensuring ethical protections for vulnerable participants, and planning for disengagement. These considerations are crucial for minimizing harm, respecting participant autonomy, and enhancing the quality and reliability of the research findings. Delving into the preparation phase of conducting interviews on sensitive topics within media and communication research, this segment focuses on two critical aspects: Participant Selection and Researcher Preparedness. These components are fundamental in ensuring the research process is both ethically sound and methodologically robust, particularly when navigating the complexities of sensitive subjects.

Participant Selection: Selecting participants for interviews on sensitive topics requires a thoughtful approach that respects the potential vulnerabilities of individuals and the ethical implications of involving them in the research. The process involves several key strategies:

> **Identifying Participants:** Researchers should use criteria that ensure participants have relevant experiences or perspectives on the sensitive topic under study. This might involve purposive sampling to select individuals based on their specific characteristics or experiences that are pertinent to the research questions (Liamputtong, 2007).
>
> **Approaching Potential Participants:** The initial contact should be handled with care, clearly explaining the research's purpose, why they have been chosen, and the nature of their expected contribution. Transparency about the study's goals and the sensitive topics to be discussed is crucial to gain trust and informed consent.
>
> **Informed Consent:** Obtaining informed consent is especially critical in research involving sensitive topics. Participants must be fully informed about the study's nature, including any potential risks or discomforts, the confidentiality measures in place, and their right to withdraw at any time without penalty (British Sociological Association, 2006).
>
> **Sensitivity to Participant Vulnerability:** Researchers must be attuned to signs of distress or discomfort in participants and be prepared to offer support or referral to appropriate services if needed. This ethical consideration ensures respect for participants' well-being and dignity throughout the research process.

By carefully selecting participants and ensuring researchers are adequately prepared, the research on sensitive topics in media and communication can be conducted with the respect, care, and ethical rigor that these subjects demand. This preparation not only safeguards the well-being of participants but also enhances the quality and credibility of the research findings, contributing valuable insights into complex and sensitive areas of human experience.

Framing Questions with Sensitivity

The manner in which questions are framed can significantly influence participants' comfort levels and willingness to share their experiences and perspectives (Lee, 1993; Renzetti & Lee, 1993). When dealing with sensitive topics, it is crucial to:
Use Open-ended Questions: These encourage participants to share their thoughts and experiences in their own words, allowing for a depth of understanding that closed questions might not achieve. Open-ended questions facilitate a narrative that can reveal the complexities and nuances of participants' experiences with sensitive topics.
Avoid Leading or Loaded Questions: Questions should be neutral and not imply judgment or assumptions about the participant's experiences or perspectives. This is particularly important in sensitive research to avoid biasing responses or causing discomfort to the participant.
Prioritize Comfort and Control: Give participants the control to steer the conversation around sensitive areas. Phrasing questions in a way that allows participants to choose how much they wish to disclose respects their autonomy and comfort levels.

Sequencing Questions for Comfort

The order in which questions are asked can help in building rapport and trust with the participant before delving into more sensitive or potentially distressing topics. A well-considered sequence might follow this general pattern (BPS, 2014; Orb, Eisenhauer, & Wynaden, 2001):

- Begin with General, Less Sensitive Questions: Start the interview with broader questions related to the topic that are easier for participants to answer. This approach helps in easing into the interview and building a comfortable conversation flow.
- Gradually Move to More Sensitive Questions: Once rapport has been established and the participant seems more at ease, gradually introduce questions that touch on the more sensitive aspects of the research topic. This strategy should be flexible; the interviewer must be attuned to the participant's cues and ready to adjust the pacing or skip questions if necessary.
- End on a Positive or Neutral Note: Concluding the interview with less sensitive, more general questions or asking for any final thoughts the participant wishes to share can help in leaving the conversation on a positive or neutral note, mitigating any distress that the sensitive topics might have caused.
-

Preparing for Emotional Responses

Sensitive topics can evoke strong emotional responses. An interview guide should therefore include strategies for handling such reactions, ensuring the participant's well-being throughout the process (Woodby et al., 2011; Sieber & Stanley, 1988):

- Anticipate Potential Emotional Triggers: While it's impossible to predict all reactions, being aware of questions or topics that are likely to be particularly sensitive can help in preparing to respond with empathy and support.
- Include Pause Points: Build in opportunities for breaks or pauses, allowing participants (and researchers) to take a moment if the conversation becomes emotionally challenging.
- Plan for Support: Have information on hand for relevant support services or resources to offer participants if they become distressed or request assistance.

Ethical Considerations

Finally, the ethical implications of interviewing about sensitive topics necessitate a thorough review of the interview guide by ethics committees or review boards. This includes ensuring that the guide respects participants' privacy, confidentiality, and right to withdraw from the study at any point without consequence. Remember, researchers “have a moral responsibility to protect their respondents from physical and emotional harm. There should be no deception about the scope, intention, [or] goals of [the study]” (Brennen, 2017, p. 31). Researchers must disclose any potential harm of the study and they must also get informed consent from participants. Researchers need to fully explain their study, maintain the privacy of their interviewees, and treat them with the utmost respect. Records need to be confidential, and there should be no confusion between the researcher and the interviewee (Brennen, 2017).

Scenario

You are a researcher conducting a study on the experiences of minority religious groups in a conservative country. The aim of your research is to understand the challenges these individuals face due to their religious beliefs and how they navigate their daily lives within a predominantly conservative society. Given the sensitive nature of the topic, you recognize the importance of approaching your interviews with empathy, discretion, and respect for your participants' safety and privacy.

Interview Research Guide

- Establishing Trust and Rapport
    - Pre-Interview Communication: Clearly explain the purpose of your research, how you will use the information, and the measures you will take to ensure confidentiality and anonymity. Offer to share your research findings with them if they are interested.
    - Informed Consent: Ensure participants fully understand their rights, including the right to withdraw from the study at any point. Use simple, non-technical language.
    - Building Rapport: Start with less sensitive questions to make your interviewees feel comfortable. Show genuine interest in their perspectives and experiences.
- Ensuring Anonymity and Safety
    - Pseudonyms: Use pseudonyms for all participants in your study and any publications resulting from it.
    - Location: Choose a neutral, safe, and private location for interviews, or consider secure online platforms if face-to-face meetings pose a risk.
    - Data Protection: Use encrypted digital tools for recording and storing data. Be transparent about how you will protect their information.
- Sensitive Questioning Techniques
    - Open-ended Questions: Encourage participants to share their stories and perspectives by asking open-ended questions that prompt detailed responses.
    - Active Listening: Demonstrate empathy and understanding through active listening, acknowledging their experiences without judgment.
    - Cultural Sensitivity: Be aware of and sensitive to cultural norms, values, and language nuances. Avoid making assumptions about their beliefs or experiences.
- Handling Distress

    - Emotional Support: Be prepared to pause the interview or provide support if the conversation becomes emotionally challenging for the participant.
    - Referral Information: Have a list of support resources, such as counseling services, in case participants need further assistance.
- Closing the Interview
    - Debrief: Offer a debriefing session at the end of the interview to discuss any concerns and clarify any misunderstandings.
    - Gratitude: Express your sincere gratitude for their participation and courage in sharing their experiences.
- Post-Interview
    - Follow-up: If agreed upon, follow up with participants to share summaries of the findings or the final report, and to thank them again for their contribution.
    - Reflection: Reflect on your own biases and assumptions throughout the research process to ensure they do not influence the interpretation of the data.

Convincing Interviewees

- Emphasize Impact: Highlight how their participation could contribute to greater understanding and awareness of the issues faced by minority religious groups.
- Assure Confidentiality: Reassure them of the stringent measures in place to protect their identity and the information they share.
- Peer Support: If possible, engage community leaders or members who have agreed to participate to share their positive experiences and encourage others.
- Remember, the key to a successful interview in sensitive settings lies in showing respect, empathy, and understanding towards your participants. Your approach should always prioritize their comfort, safety, and well-being.

General Guide for Qualitative Interviews

Let's delve deeper into each step, incorporating advanced strategies and nuanced considerations.

Refining Research Objectives

Literature Review: Conduct a thorough review of existing literature to identify gaps in knowledge and refine your research questions. This step ensures that your study contributes new insights to the field of mass communication and media (Bryman, 2016).

Theoretical Framework: Develop a theoretical framework to guide your inquiry. This framework will shape your understanding of the phenomena under study and inform your interview questions (Corbin & Strauss, 2014).

Identifying Key Themes

Start by identifying the key themes or topics that align with your research objectives. These themes will form the backbone of your interview guide, ensuring that your questions cover the breadth of your research area (Ritchie et al., 2013).

Crafting Questions: For each theme, craft several open-ended questions that encourage detailed responses. Questions should be designed to elicit rich, descriptive answers, avoiding yes/no responses. The wording should be neutral to avoid leading the participant towards a particular answer (Rubin & Rubin, 2011).

Sequencing Questions: Organize your questions in a logical sequence, typically starting with broader questions to ease participants into the conversation before moving to more specific or sensitive topics. This sequencing can help build rapport and make participants more comfortable sharing in-depth information (Galletta, 2013).

Incorporating Probes: Include probes or follow-up questions for each main question. Probes can help delve deeper into a topic or clarify responses, providing richer data for analysis (King & Horrocks, 2010).

Selecting the Interview Type

Comparative Analysis: Consider the advantages and limitations of different interview types (structured, semi-structured, unstructured) in relation to your research objectives. Semi-structured interviews are often ideal for exploring complex issues in depth while allowing for the discovery of new themes (King & Horrocks, 2010).

To delve deeper into the selection of interview types, particularly focusing on structured, semi-structured, and unstructured interviews, it's essential to understand the nuances and implications of each approach for qualitative research in mass communication and media studies. This detailed exploration will include citations to ensure each point is thoroughly supported.

Structured interviews use a predetermined standard, with questions that are already established and do not leave much room for follow-up questions Structured interviews are characterized by a fixed set of questions asked in a specific order, offering little to no flexibility for deviation. This format is beneficial for quantitative research or when comparing responses across a large number of participants. However, its rigidity can limit the depth of responses and may not be suitable for exploring complex media phenomena where the context and personal experiences play a crucial role.

Advantage: Facilitates comparison and statistical analysis due to uniformity in responses (Bryman, 2016).

Limitation: May not capture the richness of participants' experiences or allow for the exploration of unexpected themes (Flick, 2018).

Semi-structured interviews strike a balance between structured and unstructured formats, using a guide with prepared questions but allowing for follow-up questions and exploration based on participants' responses. Semi-structured interviews follow pre-established questions, but there is much more flexibility. This flexibility allows researchers to ask follow up questions or deviate from the questions they had crafted beforehand. This flexibility makes it particularly suited for qualitative research in mass communication and media, where understanding the nuances of media consumption, production, and interpretation requires open-ended discussion.

Advantage: Enables researchers to explore topics in depth while maintaining focus on the research objectives. It allows for the discovery of new themes and insights that were not anticipated at the outset of the study (King & Horrocks, 2010).

Limitation: Requires skilled interviewers capable of adapting the interview flow and probing deeper without leading the participant, which can be challenging to achieve (Kvale & Brinkmann, 2009).

Unstructured interviews are the most flexible, with no predetermined questions or order. The discussion flows more naturally, akin to a conversation, guided by the interests of the participant and the researcher's objectives. Unstructured interviews capture “complex voices, emotions, and feelings of interviewees, as well as the meanings within the words that are spoken…[they cover] complex information about complicated issues, emotions, and/or concerns” (Brennen, 2017, p. 29). Researchers may start an unstructured interview with a list of themes or topics they want to cover and then the conversation goes from there. This format is ideal for exploratory research where the aim is to understand experiences, perceptions, and meanings without imposing predefined notions.

Advantage: Maximizes the potential for participants to share their stories and perspectives in their own words, leading to rich, detailed data (Rubin & Rubin, 2011).

Limitation: Can result in a vast amount of data that is challenging to analyze and may stray far from the initial research objectives. It also risks inconsistency across interviews, complicating comparisons (Charmaz, 2014).

Choosing the Right Type

The choice among structured, semi-structured, and unstructured interviews should be guided by the research questions, objectives, and the nature of the phenomena under investigation. Semi-structured interviews are often preferred in mass communication and media studies due to their flexibility and depth, allowing researchers to explore the complex dynamics of media processes and effects while retaining a focus on specific research themes.

Consideration: The researcher's skill set, the sensitivity of the topics, and the participants' backgrounds should also influence the choice of interview type. Building rapport and ensuring ethical considerations are paramount, regardless of the format chosen (Sieber & Tolich, 2013).

Pilot Testing the Interview Guide

Pilot Testing: Before conducting your main interviews, pilot test your interview guide with a few participants. This can help refine your questions, ensure they are clear and understandable, and adjust the guide based on preliminary feedback (Galletta, 2013). Pilot testing the interview guide is an essential step not to be overlooked. It involves conducting a few trial interviews using the draft guide to identify any issues with the questions or the flow of the conversation.

Objective of Pilot Testing: The primary objective is to test the clarity, flow, and effectiveness of the interview questions and the guide as a whole. This process can reveal whether questions are too complex, leading, or open to interpretation, allowing for necessary adjustments (Galletta, 2013).

Selecting Pilot Participants: Choose a small number of participants who are similar to your target population for the pilot test. Their feedback can provide valuable insights into how your target audience might understand and respond to your questions (Pilot & Hunger, 2015).

Conducting the Pilot Interviews: Approach these interviews as you would the main study, noting any issues with question comprehension, the flow of the interview, and whether the questions elicit the type of information relevant to your research objectives (Van Teijlingen & Hundley, 2001).

Refining the Guide: Use the insights gained from pilot testing to refine your interview guide. This may involve rewording questions, adjusting the order, or adding/removing questions to better meet your research objectives (Galletta, 2013).

Iterative Process: Consider pilot testing as an iterative process. It may be necessary to conduct multiple rounds of pilot interviews and refinements to ensure the interview guide is as effective as possible (Dunn, 2005).

Selecting Participants

Sampling Strategy: Beyond purposive sampling, consider using snowball sampling to access hard-to-reach populations or theoretical sampling to guide participant selection based on emerging patterns and themes from initial data (Glaser & Strauss, 1967).

Sample Size: While qualitative studies do not require large sample sizes, consider the concept of saturation—the point at which no new information or themes are observed in the data—as a guide for when to stop collecting data (Guest, Bunce, & Johnson, 2006).

Sampling Strategies

Purposive sampling involves selecting participants based on specific characteristics or qualities that align with the research objectives. This method is particularly useful when looking to explore a phenomenon in depth within a specific group or context.

Application: In media studies, purposive sampling can help target individuals who are part of a niche audience or have specific media consumption habits relevant to the study (Patton, 2015).

Snowball sampling is useful for accessing hard-to-reach populations. Initial participants recruit future participants from among their acquaintances. This method is beneficial for studying social networks or media behaviors within closed or hard-to-reach groups.

Advantage: Enables researchers to access participants who would be difficult to reach through traditional methods (Biernacki & Waldorf, 1981).

Limitation: May introduce bias, as the sample may not be representative of the broader population (Noy, 2008).

Theoretical sampling involves selecting participants based on emerging themes and concepts from the data collected, rather than pre-defined criteria. This approach is aligned with grounded theory methodology.

Purpose: To develop and refine theories based on data, ensuring that sampling contributes directly to the theoretical construct of the study (Glaser & Strauss, 1967).

Process: Continues until theoretical saturation is achieved, meaning no new themes or insights emerge from data collection (Charmaz, 2006).

Determining Sample Size

Concept of Saturation

Saturation is a key concept in qualitative research, referring to the point at which no new information or themes are observed in the data. It is a critical factor in determining sample size. Implication: The researcher must remain flexible, as the exact number of participants needed to reach saturation cannot be predetermined and varies by study (Guest, Bunce, & Johnson, 2006).

Practical Considerations

While theoretical saturation is the ideal guide for determining sample size, practical considerations such as time, resources, and the scope of the study also play a significant role. Balancing Depth and Breadth: Researchers must balance the need for depth of understanding with the practical limitations of conducting qualitative research (Morse, 1994).

This detailed exploration into participant selection strategies and considerations for sample size in qualitative research within mass communication and media studies provides a foundational understanding of how to approach these critical aspects of study design, ensuring that the research is both rigorous and meaningful.

Conducting the Interviews

Interview Techniques: Employ advanced interview techniques such as reflective listening, summarizing the participant's points for clarification, and using silence as a tool to encourage deeper reflection (Kvale & Brinkmann, 2009).

Ethical Sensitivity: Be particularly sensitive to ethical concerns, especially when discussing sensitive topics. Ensure participants feel they can stop the interview at any point or skip questions they are not comfortable answering (Israel & Hay, 2006).

Recording and Transcribing Interviews

Transcription Nuances: Pay attention to linguistic nuances, such as laughter, pauses, and intonation, as they can provide insights into the participant's feelings and attitudes (Oliver et al., 2005).

Transcription Software: Consider using transcription software to aid in the transcription process, but ensure the accuracy of the transcripts by thoroughly checking them against the audio recordings (Davidson, 2009).

Recording Interviews

Best Practices: Ensuring high-quality audio recordings is paramount for accurate transcription and analysis. Poor audio quality can lead to missed nuances or misinterpretations of the data. Use external microphones and conduct interviews in quiet environments to enhance recording quality (Roulston, 2010).

Ethical Considerations:
Recording interviews requires explicit consent from participants, with a clear explanation of how the recordings will be used, stored, and disposed of to protect their privacy.
Informed Consent: Researchers must obtain informed consent that covers the recording process, emphasizing confidentiality and data protection measures (Dinger, 2018).

Transcribing Interviews

The accuracy of transcription is critical for qualitative analysis. Transcripts should capture not only the words spoken but also non-verbal cues like pauses, laughter, and intonation, which can convey significant meaning. Verbatim Transcriptions, including non-verbal cues and fillers provides a more complete picture of the interview context and the participant's emotional state (Poland, 1995). While transcription software can significantly speed up the transcription process, researchers should be cautious about relying entirely on automated transcription due to potential inaccuracies, especially with complex audio or diverse accents. Choose transcription software with high accuracy rates and the ability to handle the specific language and dialects of your participants. Manual review and correction of transcripts are essential (Davidson, 2009).

Interpreting Non-verbal Cues

Non-verbal cues play a crucial role in communication, offering insights into participants' unspoken emotions and reactions. These cues can be particularly revealing in interviews about sensitive topics or where participants may have reasons to withhold full disclosure. Researchers should develop a coding system for non-verbal cues to systematically analyze their significance within the interview context (Birdwhistell, 1970).

Interpreting non-verbal cues requires a nuanced understanding of the cultural and individual contexts. Misinterpretation can lead to inaccurate conclusions. Be aware of cultural differences in non-verbal communication and seek to understand the personal and cultural context of each participant (Hall, 1966).

This deeper exploration into the recording and transcribing of interviews highlights the critical importance of these processes in qualitative research. By ensuring high-quality recordings, accurate and nuanced transcriptions, and a sensitive interpretation of non-verbal cues, researchers can significantly enhance the reliability and depth of their findings in mass communication and media studies.

Analyzing the Data

Use both inductive and deductive coding strategies. Start with open coding to identify broad themes and then move to axial and selective coding to refine these themes and understand their relationships (Strauss & Corbin, 1998). Utilize qualitative data analysis software (e.g.,

QualCoder, NVivo, Atlas.ti) to manage and analyze your data. These tools can help organize data, facilitate coding, and identify patterns (Bazeley & Jackson, 2013).

Advanced Coding Strategies

- Open Coding: Open coding is the process of breaking down, examining, comparing, conceptualizing, and categorizing data. Initially, data are dissected in a granular fashion to identify significant concepts and categories.
    - Application: In media studies, open coding can help identify recurring themes related to media consumption habits, audience perceptions of media messages, or the impact of social media on public discourse (Charmaz, 2014).

- Axial Coding: Following open coding, axial coding involves reassembling the data to identify relationships between categories. This stage focuses on the connections between the identified concepts, helping to organize them around core phenomena.
    - Significance: For example, axial coding can reveal how specific media consumption patterns influence political opinions or social behaviors, providing insights into the complex dynamics of media effects (Strauss & Corbin, 1990).

- Selective Coding: Selective coding is the process of integrating and refining the categories to form a coherent narrative or theory. This involves selecting one or two core categories and systematically relating them to other categories, identifying the central phenomenon being studied.
    - Outcome: In the context of mass communication, selective coding could be used to construct a theory on the role of digital media in shaping youth identity or the influence of news framing on public perception of social issues (Corbin & Strauss, 2015).

Ensuring Ethical Considerations

Debriefing: Offer a debriefing session after the interview to discuss any issues the interview may have raised for participants and to provide support if needed (Sieber & Tolich, 2013).

Data Storage: Ensure that all data, including recordings and transcripts, are stored securely to protect confidentiality. Be clear about how long data will be stored and when it will be destroyed (Mertens, 2014).

Reporting Findings

Triangulation: Enhance the credibility of your findings through triangulation, using multiple data sources, methods, or theories to cross-check information (Denzin, 1978).

Reflexivity: Reflect on your own biases and how they may have influenced the research process and interpretations. Include these reflections in your reporting to provide transparency (Finlay, 2002).

Strategies for Effective Reporting

- Narrative Construction: Constructing a narrative around the data is a powerful way to report findings. This involves weaving participant quotes, observations, and themes into a coherent story that highlights the research's main findings and their implications.
    - Application: In media studies, narratives can vividly illustrate how individuals interact with media, the role of media in shaping societal norms, or the impact of digital transformation on traditional media practices (Riessman, 2008).

- Visual Data Representation: Utilizing visual representations such as charts, graphs, and thematic maps can enhance the accessibility of qualitative findings. Visuals can help summarize complex data, illustrate relationships between themes, and provide a clear overview of the research outcomes.
    - Significance: For instance, thematic maps can visually depict the connections between different audience perceptions of media content, making it easier to understand the complexity of audience engagement (Saldaña, 2021).

- Triangulation of Data: Triangulation involves using multiple data sources or methods to validate the findings. This approach strengthens the credibility of the research by showing that the findings are not solely dependent on a single source or method.
    - Outcome: In mass communication research, triangulating interview data with content analysis of media texts or audience analytics can provide a more comprehensive understanding of media phenomena (Denzin, 1978).

- Reflexivity Statement: Including a reflexivity statement in the report, where the researcher reflects on their biases, assumptions, and influence on the research process, is crucial for qualitative research. This transparency enhances the trustworthiness of the study.
    - Relevance: Given the subjective nature of media studies, acknowledging the researcher's perspective and potential biases is essential, especially when exploring contentious issues like media bias or representation (Finlay, 2002).

- Implications for Theory and Practice: Discussing the implications of the findings for both theory and practice is a key component of reporting qualitative research. This involves linking the findings back to existing theories and suggesting practical applications or policy recommendations.
    - Application: For example, findings on the role of social media in political mobilization can inform theoretical debates on public sphere theory and offer insights for policymakers on regulating online discourse (Couldry, 2012).

This deeper exploration into reporting findings in qualitative research within mass communication and media studies emphasizes the importance of a nuanced, transparent, and engaging presentation of data. By employing these strategies, researchers can ensure that their findings not only contribute to academic knowledge but also resonate with broader audiences, potentially influencing media practices and policies.

Advanced Interview Techniques

Reflective Listening: Reflective listening involves the interviewer actively listening to the participant and then reflecting back what has been said. This technique not only confirms the accuracy of what the interviewer has understood but also encourages participants to elaborate further.

Application: In media studies, reflective listening can help clarify participants' media usage patterns or their perceptions of media content (Rogers, 1951).

Summarizing for Clarification: Periodically summarizing the main points that participants have made during the interview serves multiple purposes. It ensures that the interviewer has correctly understood the participant's statements and gives participants the opportunity to correct any misunderstandings or add additional information.

Benefit: This technique is particularly useful in long interviews or when discussing complex topics, such as the impact of media on societal issues (Kvale & Brinkmann, 2009).

Using Silence: Silence can be a powerful tool in qualitative interviews. It gives participants time to think and often leads to more in-depth responses. Silence indicates that the interviewer is patient and interested in a thoughtful answer, rather than quick replies.

Strategy: In studies exploring sensitive topics like media influence on body image, silence can give participants the necessary space to reflect on their experiences and feelings (Brinkmann & Kvale, 2015).

Ethical Sensitivity
Informed consent: Informed consent is a cornerstone of ethical research. Participants must be fully aware of the research's purpose, what their participation involves, any potential risks, and their rights, including the right to withdraw at any time without penalty.

Consideration: Special attention should be paid to how consent is obtained when researching vulnerable populations or sensitive topics within the media (Israel & Hay, 2006).

Anonymity and Confidentiality: Ensuring participants' anonymity and confidentiality is crucial, especially when discussing topics that might reveal sensitive personal information or opinions that could lead to stigma or discrimination.

Implementation: Use pseudonyms in reporting and secure data storage methods to protect participants' identities, especially when dealing with online media behaviors or consumption (Sieber & Tolich, 2013).

Sensitivity to Participants' Comfort: Researchers must be attuned to participants' comfort levels throughout the interview, ready to modify their approach or steer the conversation away from topics that cause distress.

Approach: This is particularly important in media studies that explore personal or potentially traumatic topics, such as exposure to violent content (Dickson-Swift et al., 2007).

Nuanced Interview Dynamics

Adaptive Questioning: Adaptive questioning involves tailoring questions based on the interviewee's responses, allowing the interviewer to explore topics more deeply or shift focus as new themes emerge. This dynamic approach requires a high level of attentiveness and flexibility from the interviewer.

Application: In media studies, adaptive questioning can uncover nuanced perspectives on media consumption habits or the impact of social media on public opinion, revealing deeper insights into individual and collective media experiences (Hesse-Biber, 2017).

Emotional Intelligence: The interviewer's emotional intelligence plays a crucial role in managing the emotional dynamics of the interview. Recognizing and appropriately responding to the interviewee's emotions can facilitate a more open and trusting dialogue.

Significance: Emotional intelligence is particularly important when discussing sensitive topics, such as media's role in shaping body image or societal standards, allowing researchers to navigate these conversations with empathy and care (Mayer et al., 2004).

Leveraging Technology in Qualitative Interviews

Digital Platforms for Interviews: The use of digital platforms (e.g., Zoom, Skype) for conducting interviews has become increasingly prevalent, especially in reaching geographically dispersed participants or in response to constraints like those imposed by the COVID-19 pandemic. Advantages: Digital platforms can facilitate access to a wider range of participants and can be particularly useful in studying digital media's global impact (Lobe et al., 2020).

Software for Data Analysis: Qualitative data analysis software (QDAS), such as NVivo or ATLAS.ti, supports the organization, coding, and analysis of large volumes of qualitative data. These tools can enhance the researcher's ability to identify patterns and themes within the data. Benefits: QDAS can improve the efficiency and depth of data analysis, allowing for more nuanced interpretations of complex phenomena like media influence and digital communication patterns (Paulus et al., 2014).

Ethical Considerations in the Digital Age

Digital Consent: Obtaining informed consent in digital formats requires clear communication of the research purpose, methods, risks, and benefits, ensuring participants' understanding and agreement to participate in a format that may be less personal than traditional methods.

Challenges: Ensuring that digital consent processes are as robust and comprehensive as face-to-face consent, especially when dealing with sensitive media topics or vulnerable populations (Markham & Buchanan, 2012).

Privacy and Data Security: With the increasing use of digital tools for interviews and data storage, ensuring the privacy and security of research data is paramount. This includes secure storage solutions and careful consideration of data sharing and publication practices. Strategies: Employing encryption, secure cloud services, and anonymization techniques to protect participants' information, especially when discussing online behaviors or digital media consumption (Zimmer & Kinder-Kurlanda, 2015).

This deeper exploration into qualitative interviews in mass communication and media studies underscores the importance of sophisticated interviewing techniques, the strategic use of technology, and the paramount importance of ethical considerations in contemporary research. These elements are crucial for conducting rigorous, insightful, and ethically responsible research in the ever-evolving field of media studies.

Ethnography

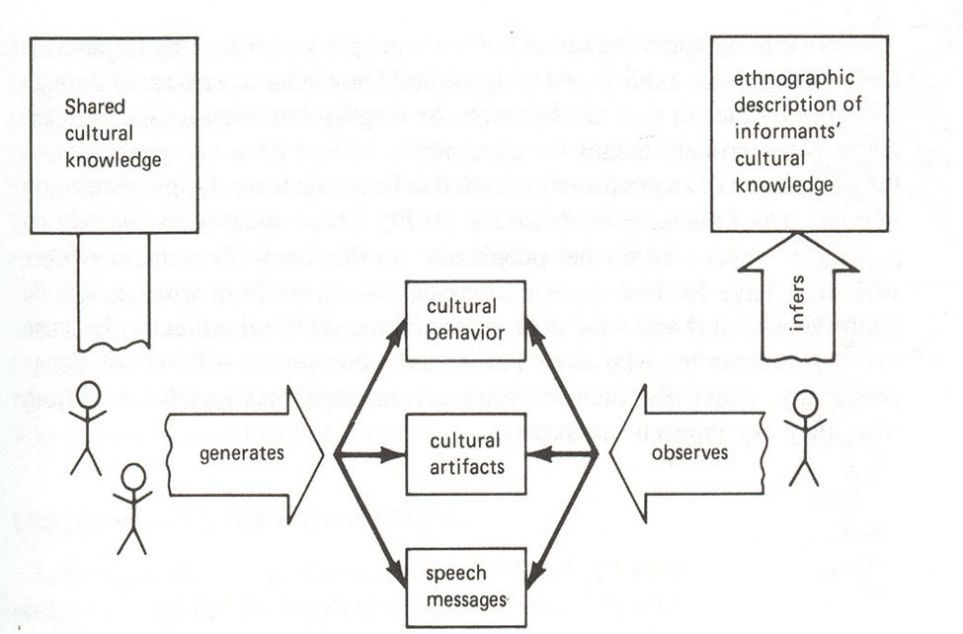
Ethnography is probably one of the most exciting methodologies and can be lots of fun for a researcher aiming to learn about a new culture, phenomenon, customs, rituals, etc. As Strudwick (2021) describes in her book,“This is fascinating, getting to know people, how they think and behave and asking questions opens a whole new world.” (p. 2)

What is Ethnography?

Ethnography is derived from the Greek word ‘ethnos’, which means people, nations, cultures, and ‘graphy,’ which means writing. It is a qualitative research method rooted in anthropology, dedicated to the systematic study of cultures and the embedded meanings from an insider's perspective. “Meanings are handled in, and modified through, an interpretive process used by the person dealing with the things he encounters.” (Blumer, 1969)

Ethnographers participate in the daily life of the community or group being studied, observe, and take notes about the actions within the group. As per the quote above, asking questions – no matter whether these take the shape of structured interviews or casual conversations – with the actors is also a crucial step in ethnographic study. Ethnographers thereby learn meanings the actors attach to their behaviors and everyday interactions.

Figure 1 Making Cultural Inference (Spradley, 1980)



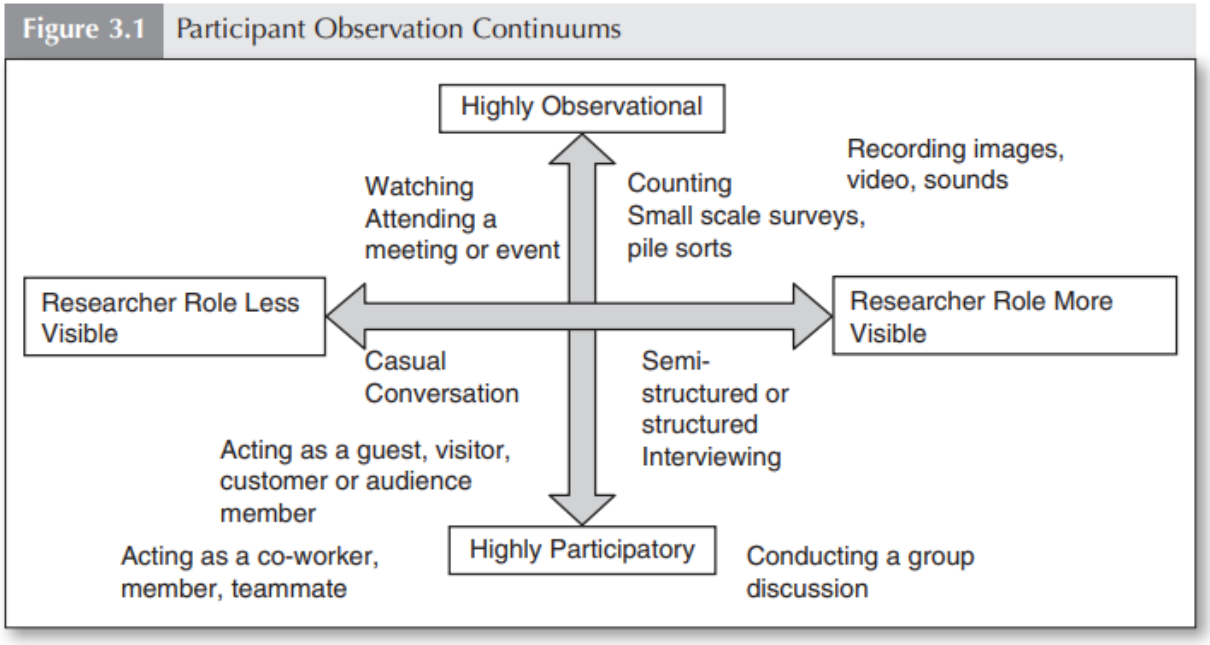
Key concepts in Ethnography

Here are some key concepts in ethnography you need to know before we dive into how to do ethnographic research.

Participant observation

Participant observation is an emic approach describing from the perspective of an insider, as opposed to an etic approach which takes an outside perspective (i.e., not participating). The method "combines participation in the lives of the people being studied with maintenance of a professional distance that allows adequate observation and recording of data" (Fetterman, 1998, pp. 34-35). It underscores the researcher's role of participant and interaction with other people in the observed settings. On the contrary, in a non-participant observation, researchers have limited interaction with people in the settings, therefore contextual knowledge may not be uncovered. Below is a continuum showing different levels of participant observation based on visibility and participation.

Figure 2 Participant Observation Continuum (Guest et al., 2013)



Rather than studying people, ethnography means learning from people. The participant observer engages in activities appropriate to the situation and observes the activities, people and physical aspects of the situation. The ethnographic fieldworker both participates as an 'insider' and observes as an 'outsider'.

- "It is not studying a village, neighborhood etc. it is studying in a village, neighborhood etc. " (Geertz, 1973)
- "When you are doing an ethnographic project, it's you and the place, it's you and the people. You can't not write yourself into it. You are a part of it." (Jordan, 1997)

Thick description

Thick description is the term that Geertz (1973) borrowed from the philosopher Ryle (Wright, 2015) and used to describe ethnography where he discussed fieldnotes as the inscription of thick description (Warren & Karner, 2015). It involves a detailed description of the participants' cultures, behavior, mutual differences, and practices after researcher's up-close observation (Delve, accessed 2024).

The opposite of thick description is thin description. Here is a straightforward comparison of the two:

Table 1 Sample Descriptions of a Campus ROTC Building (Warren & Karner, 2015)

Thin description	Thick description
I walked into the ROTC building and asked someone for directions to the student lounge, and went upstairs.	The ROTC building, as I approached it, looked as if it were built in the 1920s out of native stone. Above the door that I was approaching a Roman eagle was carved, wings outspread. The door had a pane of glass in the center, and on the glass was taped a typed list of (many) rules of conduct to be observed in the building, a list I did not read but decided I would read carefully when I came out later. As I entered, I observed that there was much upon the walls. There were glass cases to my left that stretched from about waist height to head height (of a six footer) and contained many sports trophies and photographs. To the right, photographs in frames adorned the walls: displays of the faces of white men (mostly) in uniform, grouped, seemingly, according to rank, with the leader or commander at the top of the frame. That list of typed rules appeared in several more places on the walls…

Reflexivity

Reflexivity involves a recognition on the part of the researcher that we are part of the social world we study, and that we are also culture bound. In other words, we cannot take part in and observe the world around us as if we are neutral and objective outsiders. This refers to the ability to reflect critically on the ways in which one's own cultural background and standpoint influence one's view of others.

Types of Ethnographic Methods

Ethnographic methods are the techniques used to collect data for an ethnographic study. Though the first thing comes into our mind is always participant observation when we mention the word 'ethnography,' there are actually three types of ethnographic methods (Delve, 2024) that are usually used jointly or partially by researchers. Wolcott (2008) also labeled these processes as experiencing, enquiring, and examining.

Ethnographic observation: Ethnography involves two primary methods: active participant observation and passive participant observation. We will elaborate more on it in the following section (see Key concept – participant observation)

Interviews: Interviews here refer to those conducted with participants in their natural environment by directly asking questions linked to their experiences, therefore researchers can gain insights not easily accessed through other means (e.g., outside the field). When doing ethnography, researchers often do both informal interviews and later formal interviews (either structured or semi-structured, see Interview).

Archival research: Archival research in ethnography entails analyzing existing written documents related to the place or group studied, such as annual reports, websites, etc., thereby helping the researchers know more about participants' demographic information.
Some researchers refer to the preceding three techniques as three types of data to be collected (i.e., fieldnotes, interviews, documents and artifacts). This perspective is based on the argument that ethnography is both a process as you participate, and a product as you write up (Kramer & Adams, 2017). Note that it is personalized since you as the researcher are both observer and participant in the lives of those people (Sangasubana, 2011). Even two researchers conducting ethnography within the same culture will result in different findings given their distinct approaches.

When to conduct an ethnographic study?

Kramer and Adams (2017) highlight that ethnography's main goal is to holistically understand a social or cultural group. This perspective leads to identifying two key scenarios for conducting ethnographic research:

Exploring Cultural Practices and Norms: Ethnography is invaluable when you're interested in deeply understanding how cultural practices, beliefs, and norms influence people's behaviors and interactions within their community. Ethnography allows you to immerse yourself in the culture and have a close and detailed view of these practices and their meanings.

Investigating Social Interactions and Relationships: If you want to focus on the dynamics of social interactions and relationships within specific groups or communities, ethnography could provide your opportunities to get involved and figure out how these interactions occur naturally in their everyday life.

These two primary directions also extend to researching subcultures or communities formed around specific interests, such as trivia nights groups at sports bars, traditional craftsman community in modern markets, etc.
Here are some examples:

- Examination of social order and codes of behavior in a black American neighborhood in Philadelphia (Anderson, 2000)
- Investigating drinking, as a social practice, in different youth cultures from UK, Germany and Russia (Briggs et al., 2015)
- Ethnographic account of English football fans who travel home and away with their team, based upon sixteen years' participant observation. (Pearson, 2014)

Interdisciplinary Ethnographic Research Methods

Ethnography now is used across a wide range of social science beyond anthropology or cultural studies. Typical areas include user-centric design and service design, organizational and working space cultures.

> Here's an example: To investigate the consumer stickiness design model, Siebert and colleagues (2020) firstly experienced and played Pokémon Go to a moderate level of proficiency, took notes about his immersive activities and descriptions of the game service. Then the researcher conducted in-depth interviews with key informants (i.e., other players) as a process of enquiry. Finally, the authors referred to documents like press releases and service updates announcements to get information about any design related factors from the industry perspective.

In this chapter on ethnography, we will give priority to ethnography studies of cultural practice and social interactions, with a focus on participant observations and field notes taking, rather than interviews or document analysis, which you can find detailed guides in other chapters (e.g., interview, content analysis, social media analysis, etc.)

Before Entering the Field

Understanding Ethnography's Role in Media and Communication

Theoretical Underpinnings: Ethnography's strength lies in its ability to uncover the processes through which media content is produced, consumed, and interpreted within cultural contexts. It's crucial to ground your research in a solid theoretical framework that can guide your interpretation of these processes. Ethnography's interpretive nature, as highlighted by Stacey Philbrick Yadav (2018), allows researchers to view challenges as opportunities for deeper understanding.

Identify Research Question

You may not have a clearly defined research question from the very beginning for your ethnographic research, as it requires open-endedness encouraging exploration. Starting from a culture or community you are interested in would like to learn more, and you can have access to the site. It is always helpful to have a talk with your supervisors or other fellow researchers about your ideas.

Selecting the Setting

The choice of field site should be informed by its relevance to your research questions and its accessibility. This includes considering the digital or physical nature of the site, especially when studying media. For instance, digital ethnography might require navigating online communities with sensitivity to their norms and privacy expectations.

The setting (both the community/group and the physical site) should allow clear observation. You can choose a setting that you are able to fit in but not familiar with (Sangasubana, 2011). Here are some criteria for you to evaluate the feasibility of your project:

- Simplicity – a single situation
- Accessibility – free entry and participation, easy to record e.g., hospital surgery vs. bookshop
- Unobtrusiveness - How obvious will you be? Are there enough people so you won't stand out?
- Frequently recurring activities – Are there frequently recurring activities?

Determine Ethnographic Methods

Effective ethnography often involves triangulating data from various sources to build a comprehensive understanding of the research context. As we introduced in the previous section, there are three ethnographic research methods commonly used by researchers (i.e., ethnographic observation, interviews, archival research). The use of digital tools for data collection, such as social media analytics or online interview platforms, should also be planned in advance.

Obtain IRB Approval

There are two types of ethnographic research:

- Overt ethnography: People involved clearly know the researcher's identity and intentions. Nowadays, most of the ethnographies are kind of overt research because of ethics committees and risks considerations.
- Covert ethnography: Researcher's identity is not disclosed to other participants. There is a blurry boundary because even in overt research, not all of the people involved know or are aware of the research. Nonetheless, it is unlikely you'll do a complete covert ethnography where nobody realizes the researcher's identity due to ethical concerns.

There are three questions specifically for ethnographic research that need to be addressed when filling in the IRB protocol and applying for review. Here are some tips adapted from UC Irvine's and UMass Amherst's (2019) guidance from the committee's perspective:

How will you describe the participants (human subjects) involved in the research?
It's not always possible for an ethnographer to know how many and which people will be participating in the research, especially for some public environment settings like street corners, train stations, etc., compared to more controllable settings like schools, sports clubs, etc.
In this regard, please describe your anticipated participant population at your best:
Describe the kinds, groups or categories of people, and the approximate number or range (if unknown) of participants anticipated to be enrolled in each group.
If the actual number is going to exceed your estimate when you're in the field, you will need to submit a revision to your protocol.
In the section of "recruitment", explain how you'll introduce yourself as a researcher to potential participants.

What potential risks are involved in ethnography study?
The major risks of harm in an ethnographic research project usually involve the risk of invasion of privacy, stigmatization, or breach of confidentiality, and unknown risks once entering the field.

How will you achieve consent from participants?
Consent forms are not needed for observations in a public space as long as the observed individuals are not children, the observations are recorded in a way that makes it impossible to identify subjects, and the observations would not be likely to place the subject at legal, financial, or reputational risk if they became known. Otherwise, you do need a consent form.

It is not uncommon that your informants will conduct immoral acts or even illegal acts (i.e., police officers abuse' towards suspects). On the one hand, you need to preserve the confidentiality of your informants. On the other hand, you should by no means claim yourself as an innocent outsider. The IRB committee now will take these concerns into account that require researchers to inform participants that in certain situations, they must report illegal acts.

Ethical Considerations

Ethical considerations extend beyond obtaining consent; they encompass the responsibility of representing communities and individuals with accuracy and respect. Ethnographers must be vigilant about the power dynamics at play and strive to mitigate any potential harm their research might cause. This includes being mindful of how the research might impact the community in the long term.

Gain Access to the Field

Ethnographic studies are commonly conducted in three types of settings, categorized based on their level of public accessibility:

> **Public and semi-public settings:** Public settings include parts, airports, street corners; and semi-public settings include bars, restaurants, stores, etc. Generally, researchers may not need explicit permission from the **gatekeepers** who are in charge. However, the issue of unobtrusiveness – mentioned in criteria of evaluating project settings - may occur, that a long time lingering about in a public setting may make you noticeably obvious and stand out. Scholars encourage observers to engage in casual conversation with random participants in the setting (Taylor et al., 2016), but this will also arouse suspicion from others if being too enthusiastic. Though it is not required to disclose your research to all people you have contact with, it is recommended that you identify yourself and reveal your intention to certain key informants with whom you want to sustain a relationship, especially before they think of you as a spy or a criminal.
>
> **Organizations:** Organizations are usually easy to get permission for students and scholars, and a straightforward approach often works well. Gatekeepers often assume students come to learn from the experts. To maximize the chances of gaining access, the key is to manage your identity well, present a good image of yourself, and have a clear research purpose, plan, procedures in mind when being asked. Some organizations, like hospitals, government agencies, are difficult to negotiate with an individual researcher. In this situation, it would be helpful if you have an acquaintance,

friend, family member from the organization or have some resources to help you reach out. Note that the IRB committee sometimes may require a letter from the organization.

Private settings: Gaining access to private situations and settings like homes is extremely difficult. Consent must be carefully negotiated with each potential informant before observation. For privacy concerns, IRB is often cautious about approving projects where researchers ask the organization to introduce them directly to participants. Taylor and colleagues (2016) compare the process to recruiting participants for interviews. A patient, snowballing approach is recommended—starting with a few contacts who can introduce the researcher to others, participating in public community events, or advertising the research to attract participants.
You need to start taking field notes of the process of gaining access. The settings, difficulties you faced, conversations with gatekeepers, may all be relevant to your future analysis.

Building Rapport and Trust

Building rapport with participants often requires sustained engagement with the community. This might involve participating in community events or online forums, beyond the immediate needs of data collection. Ethnographers should be prepared to invest time in these activities, as they are crucial for building trust and gaining deeper insights.

Practical Preparations

Dealing with Language and Cultural Barriers: If conducting research in a culture or language different from your own, it's essential to develop a strategy for overcoming these barriers. This might involve working with translators or cultural mediators who can provide access to nuanced cultural meanings and expressions.

Reflexive Practice: Ethnography requires a reflexive approach where researchers continually reflect on their role and influence within the research context. This reflexivity should be integrated into the research process, from field notes to the final report, to provide transparency about the researcher's positionality and how it may have influenced the research findings.

Adaptive Research Design: Ethnographic research is dynamic, and researchers must be prepared to adapt their methods and focus in response to the evolving research context. This might involve revising research questions, adopting new methods, or re-evaluating the research site as the study progresses.

Entering the field

First days in the field

We will first talk about various issues and difficulties you may face when you first enter the field, along with advice from experienced ethnographers. During the first days in the field, the researchers should be patient and learn to behave appropriately like other participants in the field. A good point to start is the dressing code in order to be unobtrusive in the settings. Researchers should keep in mind that not all participants have the same level of acceptance towards your presence. You may feel uncomfortable as being watched by other participants,

even though it is your task to observe. Before trying to ease and build good relationships with other participants, researchers themselves should gradually build confidence and overcome the mental issues. As the study proceeds, you will feel more comfortable in the settings.
Another common issue is the overwhelming amount of information. You can stay for a shorter time at the beginning of your observations until you get used to the situation and extend the length. Some participants may be enthusiastic to introduce a great amount of information about the community and their culture to you. You should be cautious that you do not let that information occupy your mind and constrain your observation, even though you do not do it on purpose.

Establishing rapport

Rather than 'trust', 'relationship', 'mutual understanding', ethnographers often use the term establishing 'rapport' with informants as the primary goal in the field. It is a complex and multidimensional construct that is hard to define:

> "It means many things: communicating a feeling of empathy for informants and having them accept it as sincere; penetrating people's "defenses against the outsider" (Argyris 1952); having people open up about their feelings about the setting and others; being seen as an okay person; breaking through the fronts (Goffman, 1959) people impose in everyday life; sharing in informants' symbolic world, their language, and their perspectives (Denzin, 1978)." (Taylor et al., p.58)

The strategies taken may differ as per each observer's personality and skills. You can reflect on yourself in what ways you are likely to have good impressions on a person you only meet for once. Here are some general tips:

- Do as the Romans do. Observers can adapt themselves with informants' routines and behaviors.
- Share common interests. Have some casual conversations to find any commonality you have with the informants. This is especially useful when you conduct research in a community with special interests.
- Do people a favor. People are likely to trust in people who offer help to them. You can be a driver in a senior society, or help people carry luggage at a train station, or buy employees coffee at a workplace.

Taking field notes

Ethnographers use a wide range of terminologies like "headnotes," "fieldnotes proper," "fieldnote records," (Emerson et al., 2011), and think of different contents of field notes - either joint or separate records of others' behaviors and their own reflections - thereby have different habits in taking field notes. Some prefer to write a handful of notes by the end of each observation day, while some tend to take sparnotes and complete the details after leaving the field.

Researchers should start recording field notes **from the pre-fieldwork stage**, as we mentioned in the section of gaining access, and take detailed field notes after **each** observation. Here it does not refer to a whole day of observation. Instead, it is common for ethnographic researchers to take field notes after one hour of observation.

In this section, we will introduce the most frequently used types of written notes and tips to you as a beginner.

Types of field notes

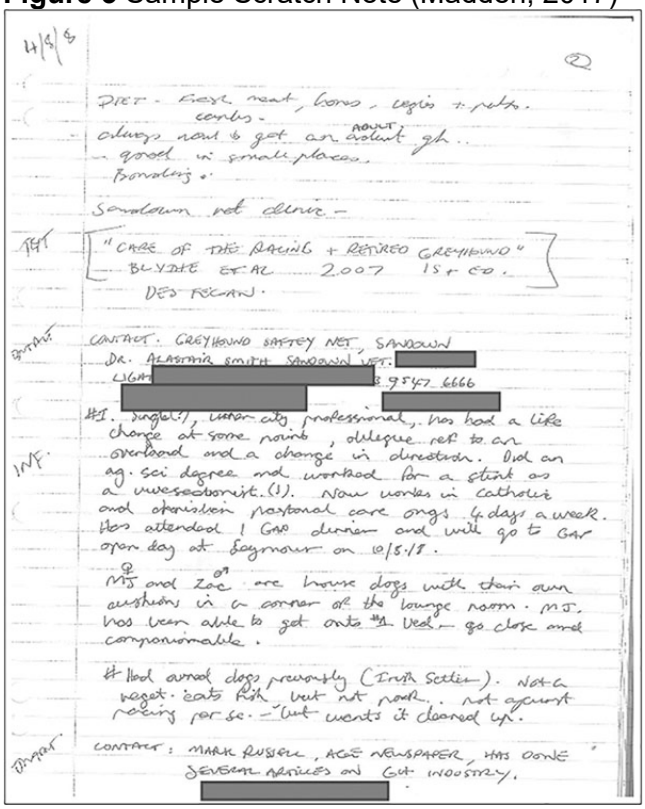
During the observation:

Headnotes: Headnotes are the mental notes researchers take as they observe or interact within the field, and will be written down later. Headnotes are often taken in the situation that the observer will look strange if he or she takes out pen and paper to write. It heavily relies on the researcher's memorizing and recall ability. It is recommended to write those key words or ideas down immediately when you get a chance to write during the observation.

Scratch notes: Jottings, key words, mnemonics, shorthand or any rough notes which you manage to write down while you are observing or talking to informants. These should be written in the place of observation. Researchers often elaborate more on their scratch notes to write up the extended field notes after each observation.

Jottings - captures or keywords of events and impressions you think should be remembered, and these words can help you recall the scenarios. These can include timestamps, location details, participant actions, and verbatim dialogue.

Figure 3 Sample Scratch Note (Madden, 2017)



After the observation:
You need a well-written format developed from your headnotes and scratch notes after each observation, as well as your reflections and analysis, in an extended field note. Here are some common aspects included and may be labeled in different terminologies by other ethnographers. We would recommend you to create a template covering these parts as well as other essential elements.

Descriptive notes: These notes are the description of the cultural reality observed. These are the first steps towards the writing-up process. Write up in detail what you saw, what you heard, what you did, actions and reactions, describe everything using the method of thick description.

Figure 4 Sample Descriptive Note (Emerson et al., 2011)

Today Molly, a white female, wore her African motif jacket. It had little squares on the front which contained red, yellow, green, and black colored prints of the African continent. Imposed on top was a gold lion of Judah (symbol of Ethiopian Royal Family). The sleeves were bright—red, yellow, and green striped. The jacket back had a picture of Bob Marley singing into a microphone. He is a black male with long black dreadlocks and a little beard. Written in red at the top was: "Rastafari."

Figure 5 Sample Descriptive Conversation Note (Emerson et al., 2011)

Direct: "Did you see that girl?"
Indirect: I told her I had . . .
Indirect: . . . and Polly confided that the girl had hassled her. Polly said that the girl tried to leave school without permission and had started arguing. She said the principal had been walking by and he had tried to deal with the disturbance.
Reported speech, direct: And the girl had answered, "This is my school. You can't control me!" and then she called the principal a "white MF."
Direct: "It's usually a black MF, but she changed it."
Indirect: She said that the girl has a
Direct: "bad attitude" . . .

Reflective notes: Reflective notes include "your thoughts, ideas, questions, and concerns as you are conducting the observation" (Schwandt, 2015). As we introduced in the key concept section, reflexivity is the key characteristic in ethnography study. Some ethnographers recommend keeping a personal diary or journal to record personal feelings and impressions. However, Emerson and colleagues (2011) argued not to set clear boundaries, because ethnography is never an objective method and your subjective reflection matters.
Your reflections may relate to your observations, your personal feelings, your lessons learned for your growth as an ethnographer, etc. Therefore, you can mark them in different colors rather than keep them in a different diary file.

Figure 6 Sample Reflective Note (Emerson et al., 2011)

(With that, the group broke up, and as I walked back to my desk, I began to feel that for the first time, I had been an active participant in one of their kitchen get-togethers. This experience made me believe that I was being viewed as more than just an outsider. I have been trying to figure out what it takes to belong here, and one aspect undoubtedly is to partake in an occasional kitchen get-together and not to appear above such practices.)

Analytic notes: This is a record of analysis and interpretations to your observations and descriptive notes. It is the section where you begin to analyze the data collected. These notes include arguments, patterns, themes, and theoretical insights that emerge from the data.

Figure 7 Sample Analytic Note (Emerson et al., 2011)

Fieldnote: During the support group Fumiko comments on her husband's behavior: "Once in a while he is a pussycat" (laughter), "but he was a raging bull when the VNA came to give him a bath." She adds that recently he has fought her shaving him, but "this morning he let me do it."

Memo: Note how this description suggests that caregivers recognize that *cooperation* can vary independently of ability or condition for the person with Alzheimer's. Thus, it is one issue whether or not the person with Alzheimer's can feed or bathe him/herself, shave himself, etc.; the stance the person with Alzheimer's takes toward these helping/caring for activities is another matter.

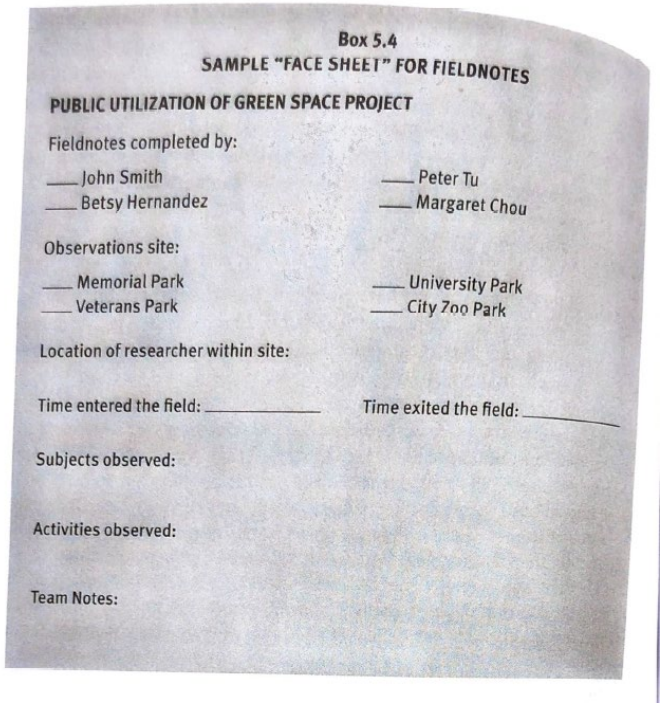
Figure 8 Sample Analytic Note (Emerson et al., 2011)

Several weeks ago, I wrote about a client whom staff found to be quite aggravating and "annoying" because she had been continually calling the crisis line at all hours of the morning. At the time I had been under the impression that staff perceived such calls as unnecessary unless they pertained to immediate threats of physical injury. Through a conversation that took place today (included in earlier notes), I realize that this was an accurate but oversimplified notion. Although the staff finds late night crisis calls quite aggravating, they also acknowledge the necessity of maintaining such an option to deal primarily with violence of an immediate and physical nature. But even if the caller's situation does not fit into that category, she wouldn't necessarily be identified as a "nuisance" unless she had called repeatedly and had enough familiarity with the organization to know better. Each caller seems to be viewed as an individual case and is treated accordingly. It is only when their issues become too time-consuming or chronic that they are identified as nuisance callers.

Some other elements you need to record in your template include:

- Field notes log
- Place
- Times
- Duration
- Pictures/videos/audios
- To-do-list

Figure 9 Sample Field note Template (Warren & Karner, 2015)



Box 5.4
SAMPLE "FACE SHEET" FOR FIELDNOTES

PUBLIC UTILIZATION OF GREEN SPACE PROJECT

Fieldnotes completed by:

___ John Smith
___ Betsy Hernandez
___ Peter Tu
___ Margaret Chou

Observations site:

___ Memorial Park
___ Veterans Park
___ University Park
___ City Zoo Park

Location of researcher within site:

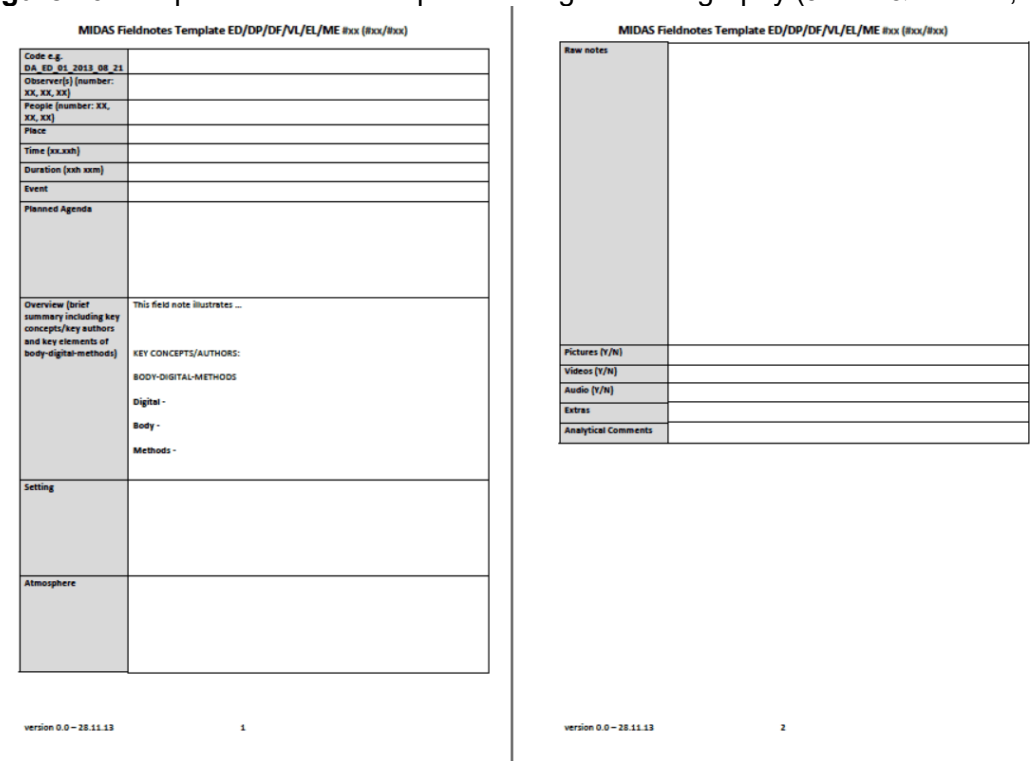
Time entered the field: _____ Time exited the field: _____

Subjects observed:

Activities observed:

Team Notes:

Figure 10 Sample Field note Template for Digital Ethnography (Jewitt & Xambó, 2013)



MIDAS Fieldnotes Template ED/DP/DF/VL/EL/ME #xx (#xx/#xx)

Code e.g. DA_ED_01_2013_08_21	
Observer(s) (number: XX, XX, XX)	
People (number: XX, XX, XX)	
Place	
Time (xx.xxh)	
Duration (xxh xxm)	
Event	
Planned Agenda	
Overview (brief summary including key concepts/key authors and key elements of body-digital-methods)	This field note illustrates ... KEY CONCEPTS/AUTHORS: BODY-DIGITAL-METHODS Digital - Body - Methods -
Setting	
Atmosphere	

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MIDAS Fieldnotes Template ED/DP/DF/VL/EL/ME #xx (#xx/#xx)

Raw notes	
Pictures (Y/N)	
Videos (Y/N)	
Audio (Y/N)	
Extras	
Analytical Comments	

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Tips

Initial stage of observation
You should take note of your first impressions of the field, both senses and physical surroundings, or even draw a picture of the settings. Use wide angles and take in as much information as possible.

Describe the setting in detail:
How is the space organized?
Notice the furniture, various objects, lighting, posters, smells, colors around you.
Are these objects being used by someone? How? Where?
Who are the people there? How do they interact with each other? Who talks to whom? Who does not talk? What are the topics of conversation?
Did you notice any recurrent action(s) or word (s)?
You should also keep in mind that, in the later process of your observations, pay special attention to how you learn, adapt, and react to the place. Reflect upon how you are learning to behave (to “fit in”) in that group.
General Guidelines for the Descriptive Content

Describe the physical setting.
Describe the social environment and how people interact with each other in this setting. Are there any specific patterns of interactions? Are there any recurrent interactions? How do they communicate, verbal or non-verbal?

Describe and behavioral patterns among participants in the settings, such as conflicts or collaboration.

Describe the participants and their roles in the setting.

You can record or note down the exact quotes from people that you think will be beneficial for analysis.

An important thing is your own impact that might have had on others in the settings you were observing.

General Guidelines for the Reflective Content
Sometimes it is not easy to separate reflections and analysis, but you should at least highlight them in different colors from the descriptive notes.

- Ideas, impressions, thoughts about what you observed.
- Questions or concerns that arose when analyzing.
- Insights about why you believe specific events occurred.
- Thoughts about future observations.

Organizing field notes
Now you get a handful of data and ask yourself: What should I do with them? Data organization is a step at the intersection of data management and data analysis. When you organize your field notes, field diaries, interview transcripts, manage them by labeling or tagging with data, place, human subjects, etc., you are actually doing an initial data analysis with reflection and categorization.

Here are some practical guides:

Detailed Transcription
Transcription is more than converting speech to text; it involves understanding the context of conversations, pauses, intonations, and even laughter. This nuanced transcription enables a deeper analysis of the data, revealing insights that might be overlooked in a straightforward transcription. For example, a pause before answering a sensitive question may indicate discomfort or uncertainty.

Referencing
Each note has to be referenced with:
Date, time and place of observation
Details of the informants (sex, age, role, status, pseudonym)
Number each page of your field-notes (even each line) so that you can index them.
Transcripts should be referenced with date, time and transcript identifier (based on the name you have given to the informant).

Coding
Basic description of your data. It might include any clue that will make that piece of data identifiable and retrievable (settings, places, situations, people, activities, things, themes, connections).
Initial coding should be an open, inductive process where codes are derived directly from the data, not from the researcher's preconceptions. As you progress, you might adopt more focused coding to hone in on specific themes (Saldaña, 2015). An example of moving from open to focused coding could involve initially coding for "community events," which later narrows down to more specific events like "wedding ceremonies" or "funeral rites," depending on the frequency and depth of data available.

Indexing
Cumulative content page in which the different descriptive codes are brought together. Each code should appear with the page number to refer to.

Categorizing
The first step of the analytic and interpretive phases of data analysis.
As analytic themes or theoretical concepts begin to emerge it is useful to start a new cumulative content page so that these concepts are easy to be found.
Color coding is a very effective way to reveal different recurrent themes in your data.

Summary Notes
The process of collecting data and analyzing data is interconnected and has to begin almost simultaneously. Because of the very nature of ethnography, it is essential that all arguments are grounded in the data collected. You must distinguish between assumptions, data that has been observed and data that has been elicited. More detailed data will produce a theoretical interpretation that will reflect more truthfully the informants' account. Give your informants a voice. Participant observation is not exhaustive; you will need to do some ethnographic interviews at a later stage. Record exact verbatim, and take notes from informal interviews you may have. The ethnographer needs to be reflexive in all the stages of the research and understand his/her role in the production, categorisation, analysis and reporting of the data. You will need to be systematic in the organization of your data this will help the formulation of hypotheses and the writing of the final report. Remember that you will need to guide your reader

through the massive amount of data you will have gathered. Every argument has to be traceable back to the source data.

Leaving the field

We as social science researchers may know what a theoretical saturation is - when your data becomes repetitive and you could not generate new insight - and it is time for you to leave the field. However, it is not easy, especially in a long year's observations, for both the observer and the participants. "Easing out" is the most common way of leaving the field, in which you gradually reduce your observation duration and frequency, in order to let people know you are leaving. This could be emotional, in both positive and negative ways. Your informants may feel betrayed and used (Warren & Karner, 2015). A not uncommon scenario and ethical concern is that the informants may have negative emotions, attitudes and even criticism against your publications, if they read them.

Analyzing ethnographic data

Now you have a bunch of organized and coded field notes and transcripts. Based on these data, what aspects could we write about in an ethnography, to write up a study of culture? Here are some example content areas that ethnographic methods seek to explore and understand. They play a critical role in the depth and richness of ethnographic research, offering pathways to explore the complexities of cultures and social interactions.

> **Thematic Analysis:** Thematic analysis is a method for identifying, analyzing, and reporting patterns (themes) within data. It involves six phases: familiarization with the data, generating initial codes, searching for themes, reviewing themes, defining and naming themes, and producing the report (Braun & Clarke, 2006).
>
> **Developing Sub-themes:** When developing themes, it's essential to recognize sub-themes that provide additional layers of understanding. For instance, under a broader theme of "religious practices," you might find sub-themes such as "rituals," "beliefs," and "community gatherings." These sub-themes allow for a more nuanced analysis and help in structuring the final write-up.
>
> **Narrative Construction:** Part of thematic analysis involves constructing narratives that weave together the different themes and sub-themes into a coherent story. This narrative approach not only aids in the presentation of findings but also in understanding the interconnectedness of different cultural elements.
>
> **Ethnographic Description:** Develop detailed descriptions of the social life and cultural practices observed. This involves writing rich, detailed accounts that convey the complexity of social interactions and cultural meanings. Thick Description: Coined by Geertz (1973), thick description involves detailed accounts of cultural practices, including the context and deeper meaning behind actions.

Analysis and Interpretation

Comparative Analysis: Interpret your findings in the context of the broader social, cultural, and theoretical framework. This may involve comparing your findings with existing literature, theories, or other ethnographic works.

Reflexivity: Reflect on your own positionality and how it influences the research process and interpretation of data (England, 1994).

Triangulation: Use multiple sources of data or methods to validate your findings (Denzin, 1978).

Utilizing Visuals: Incorporating visuals like diagrams, maps, or photos can enhance the analysis by providing concrete examples of cultural artifacts, spaces, or interactions. Visuals can also help in illustrating complex relationships or patterns identified during the analysis.

Domain analysis: Domain analysis in ethnography involves breaking down cultural knowledge into domains or categories that are meaningful to the study participants. It's a way to organize and understand the various aspects of a culture or social group being studied, such as beliefs, behaviors, social roles, and norms.

Spradley (1979) identify four elements and in cultural domain analysis, including

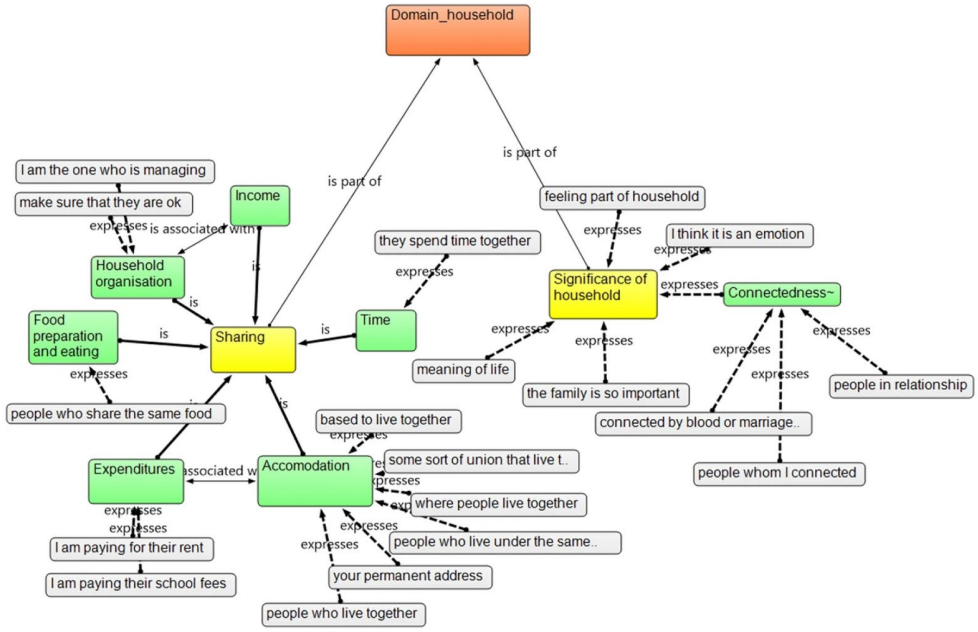
- Folk terms - the words used by informants
- Semantic relationships - between folk terms and cover terms
- Cover terms - category of a cultural knowledge
- Boundary - informants know the boundary of the domain

Here is a summary of semantic relations:

Table 2 Semantic Relations (Spradley, 1979)

Strict inclusion	X is a kind of Y
Spatial	X is a place in Y
Cause-effect	X is the result of Y
Rationale	X is a reason for doing Y
Location for action	X is a place for doing Y
Function	X is used for Y
Means-end	X is a way to do Y
Sequence	X is a step in Y
Attribution	X is a characteristic of Y

Figure 11 Sample Domain Analysis Visualization (Casimir et al., 2022)



Social Space

The concept of social space refers to the physical and symbolic spaces where social interactions and relationships occur. Social space encodes, produces, controls and maintains social behavior. Boundaries can be real and symbolic in the division of social space. Boundaries are established and crossed all the time and the crossing is often accompanied by ritual actions. In ethnography, examining social spaces can reveal how these settings influence social behavior, interactions, hierarchy, and community dynamics. It is important for ethnographers to understand the spatial order and the boundaries created by a society because this is one of the ways in which a society is experienced. A careful analysis of the settings in which social behavior happens could clarify the differences in role and status within a group, and give an insight on how people organize themselves, hint to the inclusion or exclusion of certain people, and help you understand the meaning that a group attaches to the space they act within.

Non-Verbal Communication

Non-verbal communication (NVC) involves the transmission of messages or information through non-linguistic means, including body language, gestures, facial expressions, and spatial behavior. Non-verbal communication is partially instinctive but is mainly culturally constructed and follows a set of rules set out by the culture itself. It is a cultural process that has been internalized and naturalized. It can be easily misunderstood by people who do not share the same cultural knowledge or when not contextualized.

Ethnographic research into non-verbal communication can uncover deeper layers of meaning in social interactions, revealing unspoken norms, emotions, and cultural codes.
During the field work, we should also notice that:

- NVC varies cross-culturally (micro-cultures).
- The same group or person can use NVC differently in different contexts.

- A particular gesture cannot be read as having a fixed meaning for a certain group or person. The meaning always resides in the specific context in which the action takes place.
- People involved in a specific cultural scene would either interpret or misinterpret what is communicated.

The observation and description of NVC is only a start. The key is your interpretation will be influenced by who you are, by the symbolic meaning you associate to these actions therefore reflexivity is important.

Writing Up

Ethical Reflexivity in Writing: When writing up your findings, it's important to practice ethical reflexivity, acknowledging your biases, the power dynamics at play, and the ethical implications of your research. This transparency builds trust with your readers and respects the communities you've studied.

Engaging with Critiques: A robust ethnography doesn't shy away from engaging with critiques of the methodological approaches used and the interpretations made. Addressing potential criticisms head-on strengthens the validity of your work and demonstrates a thorough understanding of the subject matter.

Digital Ethnography

Digital ethnography - also named as netnography, virtual ethnography, or online ethnography by researchers - is a modern adaptation of traditional ethnographic research which is conducted in online space. With the development of digital technology, the ethnography approach has been extended to the field to virtual spaces, such as social media and online forums. By analyzing digital communications and online social practices, digital ethnography can also uncover social norms, cultures, values, in digital communities. Below is a comparison between digital ethnography and traditional ethnography:

Table 3 Digital and Traditional Ethnography Comparison

Feature	Digital ethnography	Traditional ethnography
Settings	Virtual environment	Physical settings
Methods	Online observations, virtual interviews, digital content analysis methods	Participant observations, in-person interviews, artifact analysis
Access to the field	No geographical limitations	Limited to certain geographical locations
Researchers' presence	Remote presence	In-person attendance
Participants interaction	Often not real-time and anonymous	Real-time interaction

Researchers' access to data	Access to past online interactions	Present and observed interactions

Case Studies and Examples in Ethnographic Research in Media and Communication

Ethnographic research in media and communication has produced insightful studies that illuminate the complex interplay between media technologies, content, and audiences. Below are examples of ethnographies and the lessons could be learned from these studies.

Social Media in Rural Area: A Digital Ethnography

Study Overview: This research explored the impact of social media on rural communities, examining how digital platforms influence social relationships, community engagement, and cultural practices. The ethnographer spent extensive time living in the community, observing, and participating in social media use.

Lessons Learned:

Digital-Physical Intersection: The study underscored the blurring lines between digital and physical spaces in rural communities. Ethnographers observed firsthand how social media platforms become integral to daily life, affecting social norms and relationships.

Cultural Sensitivity: Conducting ethnography in a cultural context significantly different from the researcher's own highlighted the need for cultural sensitivity and the importance of building trust with community members to gain access to their digital lives.

Fans, Bloggers, and Gamers: Exploring Participatory Culture

Study Overview: This ethnography delved into the world of fan communities, bloggers, and gamers to understand how participatory cultures form around media content. The research focused on online forums, fan conventions, and gaming events as sites of ethnographic study.

Lessons Learned:

Community Dynamics: The study revealed the complex dynamics within fan communities, including hierarchies, norms, and the role of content creation in community engagement. Ethnographers learned the importance of immersing themselves in the community culture to understand these dynamics.

Ethical Online Research: Navigating online spaces raised ethical considerations, such as privacy and consent in public vs. private forums. The research highlighted the need for clear ethical guidelines when conducting digital ethnography.

Community-Engaged Research (CER)

Community-engaged research (CER), also known as participatory research or community-based participatory research (CBPR), is a collaborative approach wherein researchers and community members work together to identify research questions, design studies, collect and analyze data, and disseminate findings to address community needs (Minkler & Wallerstein, 2011). It democratizes research processes, empowers communities, and produces actionable knowledge that contributes to social change. This collaborative approach ensures that research questions are relevant and address the community's concerns. CER examines how people make sense of their lives, experiences, and world structures, allowing for deep exploration of social, cultural, and contextual factors influencing community well-being (Denzin & Lincoln, 2011).

The CER/CBPR framework begins with a community's issue, proposed action, or strategy and then supports or enhances this action with community-based and engaged research (Burns et al., 2011). CBPR recognizes the importance of community knowledge and its role in providing critical insights that complement administrative data. It highlights the complexity of social issues and the value of equal inclusion and collaboration in identifying, researching, and resolving community issues while recognizing the validity of community-held knowledge (Burns et al., 2011).

Active participation of community members in the research process, from identifying research questions to disseminating findings, ensures that the research is culturally sensitive, relevant, and meaningful to the community being studied (Israel et al., 1998). This amplifies the voices of marginalized groups and contributes to social change, policy development, and the creation of interventions addressing community needs (Wallerstein & Duran, 2010). The collaborative nature of CER fosters trust between researchers and community members, leading to more sustainable and mutually beneficial research partnerships. Community members are co-researchers, not mere objects of research (Mertens, 2023), which emphasizes the collaborative nature of this approach. This active community involvement fosters a sense of ownership and agency among community members, leading to more impactful and sustainable outcomes. Community engagement fosters trust and collaboration between researchers and the community, leading to a more ethical, inclusive, and transparent research process (Scheufele & Tewksbury, 2007). Involving community members in research design, data collection, and analysis ensures that findings accurately reflect lived experiences and narratives, promoting mutual understanding across partners and integrating cultural and social dynamics crucial to successful research and program implementation. The iterative process establishes valuable relationships with communities and diverse partners through resource sharing, decision-making, results sharing, and knowledge exchange throughout the research process, using community dialogue to build trust and bridge socio-cultural differences between partners (Burns et al., 2011).

CER in Media and Communication Studies

Community-engaged research (CER) in media and communication studies offers significant insights into how media influences and is influenced by communities (Broad, 2013). It allows researchers to comprehensively understand community perspectives, needs, and concerns, enabling the development of more relevant and impactful media content and communication strategies. There are several benefits to community-engaged research in media and communication studies. Firstly, it facilitates a deeper understanding of community perspectives, needs, and concerns, enabling the development of media content and communication strategies

that resonate more effectively within specific communities. Secondly, community engagement fosters trust and collaboration between researchers and the community, leading to a more ethical, inclusive, and transparent research process (Scheufele & Tewksbury, 2007). By involving community members in research design, data collection, and analysis, researchers can ensure that the resulting findings accurately reflect the lived experiences and narratives of the community (Kindon, Pain, & Kesby, 2007). In other words, community-engaged research in media and communication studies involves co-creating research agendas and priorities, promoting mutual understanding across partners, and integrating cultural and social dynamics crucial to successful research and program implementation.

Through collaborative partnerships, researchers and community members have co-created media content that challenges stereotypes and amplifies diverse voices (Shah, 2013). For example, CBPR approach can be employed to investigate media representation and its effects on marginalized communities. Furthermore, community-engaged research has been instrumental in understanding the impact of digital media on community engagement and social movements. By involving community stakeholders in the research process, scholars have gained insights into how digital platforms shape community discourse, activism, and civic engagement (Gutiérrez, 2018). Community-engaged research, therefore, has been instrumental in understanding the impact of digital media on community engagement and social movements (Tufekci & Wilson, 2012).

CER Methods

Community-engaged research (CER) encompasses various methodologies adapted to fit the unique needs and contexts of the communities involved. Qualitative research methods such as interviews (*refer interview section*), focus groups, public dialogue, and participatory observations are frequently employed in CER to gain deep insights into community experiences, perspectives, and values (Minkler & Wallerstein, 2011). These methods allow researchers to capture the nuances of lived experiences and cultural contexts, facilitating a more comprehensive understanding of community issues. It is worth noting that quantitative methods play a crucial role in CER by providing empirical data that can be used to measure the prevalence of specific phenomena, assess program effectiveness, or identify trends within the community (Minkler & Wallerstein, 2011). Thus, surveys and statistical analyses are commonly used quantitative tools that allow researchers to collect and analyze large datasets, providing valuable insights into the broader trends and patterns within the community. Also, participatory action research (PAR) is a prominent approach within CER that emphasizes active collaboration between researchers and community members throughout the research process (Strand et al., 2003).

PAR goes beyond traditional research methods by involving community members as co-researchers, empowering them to actively participate in problem definition, data collection, analysis, and decision-making (Minkler & Wallerstein, 2008). This collaborative approach promotes mutual learning and capacity building as researchers and community members contribute their unique expertise and perspectives to the research process. These diverse methodologies prioritize collaboration, equity, and cultural humility, ensuring that research conducted within communities is respectful, inclusive, and relevant (Minkler & Wallerstein, 2011). CER seeks to address power imbalances between researchers and community members, promote culturally sensitive research practices, and ensure that research findings reflect the lived experiences and priorities of the community by actively involving community members in all stages of the research process (Strand et al., 2003). The diverse methodologies employed in community-engaged research, including qualitative, quantitative, and participatory

action research, are tailored to specific community contexts and prioritize collaboration, equity, and cultural humility. Presumably, these methodologies enable researchers to gain deep insights into community issues, empower community members as active participants in the research process, and generate research findings that are relevant and meaningful to the communities involved.

Key Steps of CER/CBPR

NRC-RIM (n.d) in a document developed in collaboration with University of Minnesota offers seven step by step guideline: Community Entry, Problem Identification, Study Design, Participant Recruitment and Retention, Data Collection, Data Analysis and Reporting, and Results Dissemination, each of which is presented below.

Step 1: Community Entry

Initiate the process by mapping and identifying suitable community partners who best represent the community's interests. This may include community-based organizations, individual community members, or researchers already engaged in similar initiatives. Consider the diverse issues within the community and the desired level of participation from each stakeholder. Schedule meetings at convenient times and locations for all partners involved. In situations where physical meetings are impossible due to constraints like the COVID-19 pandemic, agree upon virtual platforms familiar to all parties. Building trust and sustaining relationships is paramount; therefore, consistently attend meetings, maintain detailed records of proceedings, and promptly follow up on action items.

Step 2: Problem Identification

Facilitate the active participation of community members in identifying and articulating priority issues. Collaboratively define the geographical boundaries of the community where the research will be conducted. Foster an environment conducive to open discussion, trust-building, and mutual respect for each other's needs, perspectives, and expertise. Evaluate the identified problems and conduct preliminary research to refine the project and formulate a research question.

Step 3: Study Design

Collaborate with the community to ensure the study design and approach align with cultural norms and values. Engage in thorough discussions with the community regarding the overarching goals and plan of the study, including their potential involvement in securing research funding. Empower community organizers to lead the planning process, including scheduling considerations to accommodate various participant commitments such as work schedules and cultural events.

Step 4: Participant Recruitment and Retention

Consult with community representatives to develop strategies for recruiting and retaining study participants. Assemble a diverse research team comprising individuals with complementary skills and expertise, including sociologists, epidemiologists, public health professionals, and community members affected by the issue under study. Utilize recruitment and retention guidelines crafted in collaboration with the community to guide the process effectively.

Step 5: Data Collection

Involve the community in developing and pre-testing data collection tools to ensure cultural appropriateness and sensitivity to local contexts, thus enhancing the validity and reliability of study measures. Create a supportive environment for stakeholders to seek clarification and ask questions. Train recruited community members in various data collection techniques based on their skill sets, encompassing tasks such as clinical sample collection, questionnaire administration, and observation protocols. Utilize the training process as an opportunity for team-building and relationship-building.

Step 6: Data Analysis and Reporting

Engage community stakeholders in collaborative data analysis and interpretation sessions, fostering a sense of ownership and mutual understanding of the results. Select appropriate methods for presenting the findings through traditional formats like PowerPoint presentations and formal reports or more creative mediums such as videos or collages. Provide training to community members interested in data analysis, leveraging their existing skills and knowledge.

Step 7: Results Dissemination

Consult with community members to identify suitable venues for sharing research findings with relevant stakeholders. Determine the key stakeholders who should be reached with the research results and develop a dissemination plan accordingly. Actively involve community members who participated in the research process in disseminating the findings, ensuring their voices are heard throughout the dissemination process.

Ethical Considerations

When conducting community-engaged qualitative research, ethical considerations are paramount. Researchers must fully adhere to IRB ethics guidelines and ensure that the rights and well-being of community members are respected throughout the research process. This includes obtaining informed consent, protecting the confidentiality of participants, and ensuring that the research benefits the community meaningfully. The principles of respect, beneficence, and justice, as outlined in the Belmont Report, guide ethical research (National Commission for the Protection of Human Subjects of Biomedical and Behavioral Research, 1979).

Numerous ethical considerations must be carefully addressed to ensure the integrity and fairness of a study, however (Burns et al., 2011) highlight the following ethical considerations as crucial. Firstly, findings should be presented in formats accessible to the community, facilitating understanding and meaningful engagement. Secondly, it is essential to prioritize the well-being of participants by ensuring they are not harmed during the research process and that they receive maximum benefits from their involvement. Thirdly, attention must be paid to community representation, considering factors such as who speaks for the community, ensuring diverse participation from various areas and social identities, and mitigating dynamics that may privilege certain voices over others. Additionally, the representation of findings and allocation of credit should accurately reflect the contributions of all involved parties. Clear data ownership, storage, and dissemination guidelines must be established to uphold privacy and accountability. Equitable divisions of labor among partners ensure fairness while ensuring justice, which involves providing equal opportunities for community participation and avoiding any unfair impact on certain groups. Maintaining respect for individuals' autonomy in engagement and

upholding rigor and fidelity in research findings are also critical for ethical practice in community-engaged research. These considerations collectively ensure that research is conducted responsibly, respectfully, and with integrity, promoting trust and meaningful collaboration within the community (Burns et al., 2011).

Shortcomings

Despite its many advantages, research on community-engaged media and communication studies has challenges. One significant hurdle is the potential for power imbalances between researchers and the community. Researchers must be mindful of their positionality and actively work to empower community members, ensuring that their voices are heard and valued in the research process (Cornwall & Jewkes, 1995). Additionally, community-engaged research requires time, resources, and a commitment to building sustained relationships with communities. This long-term investment may pose challenges in academic settings prioritizing short-term research outcomes and publication metrics. Therefore, institutional support for community-engaged research in media and communication studies is crucial for its success (Minkler & Wallerstein, 2008).

The pros and cons of community-engaged research:

Pros of Community-Engaged Research:	Cons of Community-Engaged Research:
Enhanced Relevance and Impact: Community-engaged research ensures that research priorities, methods, and outcomes are aligned with the needs and priorities of the community, i.e., it enhances research findings' relevance and potential impact on addressing real-world issues (Israel et al., 2008).	Time-Intensive and Resource-Heavy: CER requires significant time, resources, and commitment to building and maintaining relationships with community partners, which can be challenging for researchers with limited funding or competing priorities (Cargo & Mercer, 2008).
Increased Trust and Collaboration: Engaging with the community fosters trust and collaboration between researchers and community members that promotes mutual respect, shared decision-making, and co-creation of knowledge, leading to more effective and sustainable solutions (Cargo & Mercer, 2008).	Complexity of Decision-Making: Involving multiple stakeholders in decision-making processes can increase the complexity and time required to reach a consensus on research priorities, methods, and outcomes, which may lead to delays or conflicts in the research process (Israel et al., 2019).

Access to Local Knowledge and Resources: Community engagement provides researchers with access to local knowledge, expertise, and resources that may not be accessible through traditional research methods. Local insight enhances the quality and validity of research outcomes (Minkler & Wallerstein, 2011).	Potential for Bias or Conflicts of Interest: Researchers engaged in CAR may face challenges in maintaining objectivity and avoiding bias, especially when they have close relationships or shared interests with community partners that would raise concerns about the validity and credibility of research findings (Minkler & Wallerstein, 2011).
Empowerment and Capacity Building: Community-engaged research empowers community members by involving them as active participants in the research process. Involvement can lead to skill-building, leadership development, and increased community capacity to address challenges independently (Wallerstein & Duran, 2010).	Unequal Power Dynamics: Power imbalances between researchers and community partners can affect the equitable distribution of resources, decision-making authority, and recognition of contributions within collaborative research projects. Addressing these power dynamics requires ongoing reflexivity and efforts to promote equitable partnerships (Wallerstein & Duran, 2010).

Furthermore, it is important to acknowledge that Community-Engaged Research (CER) often faces challenges during fieldwork, and there is no simple solution to overcome them. The absence of a standardized protocol necessitates an adaptable approach contingent upon the specific context and nature of the research endeavor. Consequently, researchers must adopt an open-minded stance and be prepared to engage in dialogues and power negotiations with the community. The guiding principle in navigating these challenges is characterized by openness to diverse perspectives and a willingness to collaborate and share decision-making power. For example, in instances where the priorities of the community differ from those initially proposed by the researcher, it becomes imperative for the researcher to demonstrate flexibility by engaging in negotiations and relinquishing control to accommodate the community's interests. This proactive approach fosters a collaborative environment conducive to addressing challenges and achieving mutually beneficial outcomes in Community-Engaged Research.

In conclusion, CER has the potential to bridge the gap between academia and society by generating socially relevant knowledge that serves the common good. Through a community-engaged approach, CER can contribute to a more equitable and just society where the needs and voices of marginalized communities are heard and valued. Thus, CER is a valuable tool for tackling complex social issues, promoting equity, and empowering communities. This is particularly important in media and communication studies, where issues such as identity, representation, peacebuilding, consumption, democracy, and politics are directly associated with the media. While qualitative research is the main focus, a combination of quantitative and qualitative research provides a strong foundation for scholars and practitioners to authoritatively verify their findings. The different methods can act as a sort of check on each other, yielding more than the sum of their parts (Wenzel, 2020).

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Chapter 6: Digital Media Research

This section advises on how to begin your research on social media, with ideas to help frame and shape your project before beginning it in full.

When beginning a research project examining Social Media, it is easy to first find a database and then search for any interesting findings you can find. This is however heavily discouraged from most every scholar in the field. You will struggle to organize your findings around any common theme with such a vast amount of data and can run into problems similar to p-hacking (the act of repeatedly making small changes to a statistical model in order to get a small enough p-value to be statistically significant), where you see something that seems to be a pattern when really there's no effect underlying it. Begin by coming up with a topic and having a research question.

After finding a research question, decide on what social media platform you want to use, or platforms if you decide on researching multiple sites. Next, decide on how you will acquire your "data", whatever that data ends up being, how much data you think you will need, and try to think through any limitations you will find in your data. For example, if you take all the posts from within 11:00-12:00 on a website in Eastern Standard Times, users from the Eastern Hemisphere or much less likely to be using the website at that time.

McCay-Peet & Quan-Haase (2017) conceptualize data gathering through focusing on a user account (looking at every post from a particular account) or through a focus on hashtags and keywords (examining using website search functions posts you can find discussing a particular topic). If you are looking at a user account, be sure to know why that account is relevant for your research question, and is representative of something. When looking at keywords, be sure to explain why those keywords would be used for the topic you are examining, and be sure that the search you are using will find the posts you are looking for.

The "eResearch framework", developed by Janet Salmons (2017), is an approach to qualitative social media research you might find helpful in producing your research. It has several questions to aid you in understanding your methodology.

> **Align Purpose & Methods:** Are your theories and methods appropriate? How does your data relate to the topic? Do you wish to explore, prove, or generate theory? These questions depend on your topic and particular goals for the research.
>
> **Taking a position as a researcher:** Are you an insider or outsider to the group or topic? Do you explain the implications of this that will bias your study? These questions are critical to proving the validity of your data and help other scholars trust your results by showing you have already addressed these concerns.
>
> **Select between extant, elicit, or enact data:** Extant data is collecting existing material (finding and researching pre-existing posts), elicit data is questioning or observing participants (interviews, for example), and enact data is data the researcher creates through their own habits and responses to them (the researcher could follow a particular posting schedule, or begin streaming video games). These separate methodological approaches are best suited for different questions.

Select your ICT & Milieu: How will you communicate with participants? Will it be synchronous? Are your choices for a research site accessible to your participants? These questions are critical to ensure your research is able to be conducted. You need to know how you will gather your data.

Sampling & Recruiting: How will you assess if your target population has access to the site? How will you locate credible research participants and verify their identity? These questions approach whether your methodology will be truthful to the questions you're trying to answer

Ethics: Do you need permission to access data? Have you informed participants? Have you taken steps to protect your participants? For other ethical concerns, go to the ethics section of this guide here dedicated to social media research.

Collecting the Data: Are you experienced with the features of the technology? Have you conducted practice interviews and observations? Do you have an interview guide or prepared questions? Will you use the same communication features throughout interview stages? Do you have a plan for your observations such as a checklist, objectives, or a guide? Do you have a contingency for technical difficulties? These questions are important checks to make sure you are ready and competent for the research you are conducting.

TikTok Research

Overview of TikTok

TikTok is a social media application for video creation and sharing and was created by Bejing-based company called ByteDance in 2016. The international version of TikTok was launched in 2017 and quickly gained popularity. TikTok is now available in over 150 countries and surpassed over 100 million active users in the US by August 2022 (Abidin, 2021; Miltsov, 2022). By January 2024, the United States had the largest TikTok audience with almost 150 million users (*TikTok Users by Country 2024*, n.d.). TikTok has extended the maximum length of the videos to 10 min allowing users to create and share longer videos than the original 15 and 60 seconds videos. The COVID-19 pandemic boosted TikTok's popularity and contextualized the era that made TikTok well-known (Liber & Yogarajah, 2023; Vizcaíno-Verdú, 2023; Sadler, 2022).

TikTok fosters a diverse range of members and communities that are often marked by hashtags, such as #QueerTok, #BookTok, and #FoodTok. Similarly, businesses, companies, and professionals have found a place of belonging and an advertising platform from TikTok. Some members are on TikTok to have fun and scroll through the For You Page (FYP) to find entertainment, but TikTok is also a prominent place for activist communities and social movements, political messaging, spreading misinformation, and misogynistic messages (Liber & Yogarajah, 2023). FYP is a stream of videos that the TikTok algorithm selects and shows based on the TikTok users viewing habits, likes, interactions with profiles, and reactions to content (such as dislike or disinterest in content). Music and sounds are central to the content on TikTok and often guide and shape the videos rather than being considered as background. TikTok provides artist accounts and especially musicians in their early careers can benefit from the promotional features and editing possibilities. While TikTok is a relatively new social media

application, its cultural impact has been growing together with the platform's popularity (Koetsier, 2021).

The TikTok Algorithm

The TikTok algorithm can be tricky for the researcher and the researchers can view the algorithm as uncontrollable and unpredictable. Because “TikTok’s search engine optimization algorithm is proprietary, it is not possible to know precisely how search results are generated, and therefore it is not possible to retrieve results in the app that are depersonalized” (Southerton, 2021, p. 15). As TikTok cannot be depersonalized, the researcher may be inclined to think that the data is not “clean.”

However, some challenges with the algorithm can be tackled with collaborative work, and working together with other researchers can help to navigate TikTok’s fragmented landscape. Collaborative work challenges TikTok’s algorithmic boundaries and develops a broader picture of TikTok’s technological properties and platform functions (Liber & Yogarajah, 2023). As FYP reinforces past viewing habits, a conscious approach to how one navigates TikTok and developing strategies to avoid feedback loops as a result of personalization requires some extra effort. One way to do so is to avoid FYP and access content through hashtags and using the search function. To follow, or turn away from certain trends can also help to take new directions on the platform (Schelleweld, 2021). TikTok algorithm is skilled at capturing positionalities and identities and TikTok recommends videos based on this personalization limiting exposure from those that have differing opinions and political views. Again, the algorithm can be, if not tricked, guided to embrace multiple positionalities such as through gender, language, nationality, ethnicity, and other identity features serving as prominent content on the platform (Zhao, 2024). Different accounts and separate devices for research purposes can also provide some relief from the researcher's personal accounts and technologies.

Walkthrough method

Software applications (apps) pose new methodological challenges for socio-cultural digital media research. The walkthrough method developed by Light, DuGay and Burgess, is grounded in technology and cultural studies to allow the researcher to conduct a critical analysis of a given app. The walkthrough method is a way to engage with “an app’s interface to examine its technological mechanisms and embedded cultural references to understand how it guides users and shapes their experiences” (Light et al., 2018, p 822). At the core of the walkthrough method is “step-by-step observation and documentation of an app’s screens, features and flows of activity” to inspect then make the mundane actions and interactions visible and available for critical analysis (Light et al., 2018, p. 822).

The walkthrough method establishes a collection of data that allows a detailed analysis of an app’s intended purpose, embedded cultural meanings, and implied ideal users and uses. The walkthrough also serves as a foundation to centralize user-driven research and provides an entry point to understand app-specific affordances, such as how users resist and appropriate app technology for their own purposes. While the walkthrough method was not developed solely for TikTok research, it has become an integral TikTok research method as the app has been growing with the number of users and features. The limitations of the walkthrough method in TikTok research are discussed after the step-by-step guide.

To start, the researcher creates an account and logs into the app, participates in everyday use as often as possible, and logs out while attending to technical aspects like the placement or

number of icons and symbolic elements like pictures and text. This process allows the researcher to understand the app's environment by identifying and describing the **app's vision, operating model, and modes of governance**.

> ***Vision:*** The purposes, target user base, and scenarios of use. An app's vision provides users information about what the app is supposed to do, and how it can be used by whom.
>
> ***Operating model:*** Business strategy and revenue sources that indicate possible underlying political and economic interests. The app's operating model can also provide the users with in-app economies, such as gaming, to generate social, economic, and cultural capital.
>
> ***Governance:*** How the app provider manages and regulates user activity to both sustain the operations model and fulfill the vision. The app's rules and guidelines reflect the mode of governance.

Step-by-Step Guide of Walkthrough Method

Technical Walkthrough

Before embarking on the research process, the researcher will do a technical walkthrough of the application to learn how to properly use it. The technical walkthrough is the method's central data-gathering procedure and requires the researcher to engage with the app interface, work through screens, tap through buttons, and explore menus and features. The technical walkthrough is a prerequisite work where the researcher takes the user's position while analytically inspecting the process of how and where to acquire the app, registration, access features, and how to discontinue use. The researcher systematically traces and learns to use key features, and produces a data collection method by writing field notes and storing recordings, such as screenshots, videos, screen and audio recordings while conducting the walkthrough. The technical walkthrough requires the researcher to pay attention to the app's materiality before starting the research process and imagining possible user affordances and constraints. Similarly, the technical walkthrough requires the researcher to draw from cultural skills in different forms of textual and semiotic analysis and recognize cultural discourses as well as how the app constructs conceptions of gender, ethnicity, ability, sexuality, and class.

Step 1: Registration and Entry
The starting point of the walkthrough is the registration which includes the researcher's description and analysis of how the users set up an account for that particular app. For example, can the user register through a cell phone via the App Store, or does the registration require a computer or a website?

If there are both computer and mobile versions, will they differ? If yes, how? Can the user decide to use just one of the versions? What are the implications, such as the mobile version facilitating quick access and encounters whereas the desktop version provides greater interactivity with online forums? These routes to register and different versions alter the user experience and the researcher should pay attention to all the mechanisms of the registration process.

Step 2: Everyday Use

Everyday use means the regular activities registered app users engage in. The researcher records the app's functionality, options, and affordances. In essence, this can mean creating multiple profiles to engage with algorithms to navigate the app through the perspective of multiple user groups the app is designed and tailored for. The researcher will also need to consider the importance of interactions with other users and/or paying money for certain features and activities to access all the app's functions, such as payment for games.

Even without engagement with other users and monetary investment, walking through the app's basic functions (and functionality in general) allows the researcher to get a sense of what activities the app enables, limits, and guides towards. The app's flow of activity, such as the order of screens and functions, provides valuable data.

In practice, some of these considerations can include:

- Looking at the app's menu icons and their structure
- What are the menu icons and how they symbolize cultural representations (e.g. dating app Squirt's "cruising" tab refers to the history of gay men meeting in semi-public places for sexual activities)
- What are the aesthetic and color choices of the app and what might they indicate about the app's intended use
- What are the different activities the menu guides the user to do in the app and the icons associated with them
- Depending on the researcher's focus, it can be worth considering and anticipating how the users would select menu items: What associations guide these decisions?

These examples demonstrate how the researcher needs to follow and participate in the activity flow to understand the app's function, navigation, and role in users' lives.

Step 3: App Suspension, Closure, and Leaving

Leaving an app either temporarily or permanently is often difficult for the users as it has implications for the developers. The decision to not use the app anymore can range from hiding profiles to removal of user data. Some apps offer to keep one's data and profile saved even when it is removed from the app to keep users engaged and make returning to the app easier.

The walkthrough method helps to reveal how the user leaving an app may not be the total end of their relationship and to prevent leaving, apps can develop initiatives for new modes of participation, such as hiding users on dating apps and blocking users on social media apps. Walking through these aspects of the process of leaving an app provides the researcher with insights into how the apps aim to sustain use, extract value from the users even after they leave (such as selling their data), and develop features that are less favorable for the intended use for the app.

Limitations of Walkthrough Method for TikTok Research

The walkthrough method has some limitations in TikTok research. Duguay & Gold-Apel (2023) identify three different realities of TikTok's functionality that complicate the use of the walkthrough method in researching the TikTok app. These three realities are:

The Centrality of the For You Feed

Users are brought to the For You Page (FYP) immediately upon opening the app, before registration, and returned there right after registration. FYP is the central feature of the platform and is designed so that people see an endless stream of videos with very little interaction with any buttons and tabs. The FYP is put together as the main functionality to encounter content curated by algorithm, and the original walkthrough method does not address how to analyze algorithmic functionalities. Information about how algorithms process user inputs is often ambiguous and lacking as they are the same mechanisms that generate value for commercial entities.

To utilize the walkthrough method and make sense of which user inputs alter the FYP will require the researcher's rigorous recording of the actions they take, and "the multiple data points TikTok collects, and the opaque ways these are processed in aggregate, place demands on researchers to closely trace TikTok's data flows and consider elaborate research personas as a means of curating data inputs" (2023, p. Duguay & Gold-Apel, p. 6).

Hyper-Individualization Through Complex Data Flows

Personalized experience is one of the key features TikTok's vision emphasizes and which results from the app collecting and processing of user data. The privacy policy explains the extensive amount of data collected also from third-party platforms, cookies, and the user's device. Yet, it is difficult to know how all the data is mobilized in everyday use and what is their value in the recommendation system. Several apps leave personalization options for the user's manual completion which the walkthrough method can identify, such as menus and tabs, suggesting certain types of user experiences, in TikTok's everyday use "researchers generate data that shape the content they encounter, further altering the app experience in ways that are hyperindividualized" (2023, p. Duguay & Gold-Apel, p. 7). To tackle some of these challenges, multiple varied accounts and personas can be created to practice walkthroughs and to determine the influential points, yet even a new or empty account is rarely neutral as it generates content based on the app's automatic detection of user data.

However, ethnographic and autoethnographic approaches can help to understand the app's hyper individualization and personalization as the researcher can play and interact with archetypical accounts and hence profile their likely choices and actions. The intentionality of creating an archetypical account that fits the chosen #Tok can work as a means to assess user networks and content flows.

Ephemeral Interface Instantiations

The technical walkthroughs of TikTok show the rapid changes TikTok's user interface has gone through over time and it is hard to capture the app's dynamism through the technical walkthrough. In some instances, the updates have been launched during the researcher's walkthrough, and one method may not be enough to capture the impact of these changes. The changes may be sudden with no information they are about to happen or have happened. For example, Gold-Aperl noticed that three months after the menu change during her research, the "discover" tab had returned and the "friends" button had disappeared, but tracing when this

exactly happened proved to be difficult and why this happened led to mostly traces of information. The researcher must consider how methods can take into account the fast-paced changes, especially ones that are met with controversy, and how they inform about struggles among platforms and stakeholders.

Content and Discourse Analysis on Social Media

You should begin by examining the sections on content and discourse analysis here. This section will cover specific considerations when conducting this work on social media. To begin, after you have a research question best answered with content or discourse analysis, you should decide on what site you are studying. Most scholars typically find a forum or social media sites that will have data that will answer their research topic. Deciding the website you will search will be based on how popular the website is, how many users use the discussion functions, and if the website has the topic you are interested in.

There are two separate approaches you can do here-you can first find what websites are most popular and decide to just search there, or you can search for any discussion on your topic, and pick those websites because you already know the discussion is occurring. The first method is more rigorous and comprehensive, while the second method ensures you will find the information you are looking for, and is much easier to do as it can be difficult to learn what websites are the most popular.

After deciding on a particular forum for discussion, search for particular threads on that forum, using either the forum search or google-sometimes forum searches are terrible and google will be a better option. Once you have gotten some threads found, you should begin to examine the messages for common themes. When you have found enough common themes that you feel you have a solid understanding of what is going on, you can write your analysis, which is just what you think is going on, as explained by your experience with all those forum posts about the topic.

Qualitative Content Analysis of TikTok

Qualitative methods on TikTok often refer to content analysis and walkthrough method research, but interviews of TikTok content creation and how TikTok works highlight the qualitative approach to user assumptions of the app and its technology. Klug et al. (2021) explore TikTok users' beliefs about the app’s algorithm: how the algorithm works, and how the users might trick or even please the algorithm. The scholars’ mixed method research utilizes both quantitative and qualitative methods for content analysis to examine the users’ beliefs. The qualitative interviews demonstrate that TikTok users are knowledgeable of the algorithm’s functionality based on their positive experiences as consumers and questionable experiences as content creators on TikTok. The users develop skills to trick and please the algorithm to improve and optimize their user experiences both as consumers and creators. Through the 28 qualitative interviews, the scholars identify three main user beliefs about how the algorithm works to circulate content on their FYP: video engagement, posting time, adding and piling up hashtags. The scholars then collect video data based on the interview results for both qualitative and quantitative analysis.

Methodological steps taken:

Qualitative Interview Data Collection:

- IRB approval to conducted 28 qualitative semi-structured interviews in August 2020
- Interviewees are TikTok users in the U.S
- Questions ask participants about general motivations and routines of consuming and creating TikTok videos
- Questions specifically ask about the study participants understanding of and experiences with the TikTok algorithm and the algorithm influence their video creation practices
- Participants are aged 18 to 25, and 65% are female
- As of August 2020, the participants have between 300 and 450K followers, have posted between 15 and 425 videos, and have received between 10k and 11.5m likes for their TikTok videos in total
- Participants are recruited through location-based and university-related hashtags in TikTok videos (e.g. #pittsburgh, #pitt, #upenn)
- The researchers message users who included their Instagram profile on TikTok through Instagram (TikTok did not allow messaging unless accounts are following each other during the time of the research)
- The researchers message 192 from 28 users participate in the interview study (14.5% participation rate)
- Two experienced interviewers conduct the interviews and transcribe and anonymize the interview data by using an online transcription service

Qualitative data analysis:

- Three experienced researchers apply an open coding approach based on a code book as reference guide for the coding process
- The code book creation follows a deductive approach:
- All three researchers code the first interview to generate an initial set of codes
- All codes are compared to show high agreement in naming and given a description of the codes for similar interview statements and passages
- This established approach ensures validity of the qualitative results through agreement
- Codes are then grouped into a system of higher and lower level codes in relation to what is asked in the interview questions
- Each researcher uses the code book to examine an equal number of the remaining 27 interviews
- After the coding process, codes that are not applied are removed
- Codes that are applied once are revisited
- Certain codes are merged with more frequently applied similar codes
- The set number of codes is kept as single-applied codes
- Following this process, an x number of codes are created in x number of categories (in Klug et al. research the numbers are 175 codes in 33 categories)
- The researchers identify three main assumptions of TikTok algorithms based on the interviews:
- Video engagement
- Posting time
- Adding trending and algorithm-related hashtags and piling up hashtags. We then collected

- Based on the interview results and user assumptions, data exploration and analysis of 300,617 videos from TikTok is conducted to test the assumptions
- Quantitative analysis confirms that higher video engagement through comments, likes, and shares leads to a higher chance of the algorithm pushing a video to the trending section

As TikTok content is music-driven and centralize sounds and music, Vizcaíno-Verdú's (2024) exploration of music narratives and #SingWithMe challenge tackles qualitative content analysis of the musical duets trending during the first year of the pandemic through the framework of decolonization and semiotic analysis. Vizcaíno-Verdú's exploration focuses on TikTok as critical platform for music making and co-creation in addition to the user expressing and discussing their socio-cultural backgrounds, particularly as non-western and migrants. Vizcaíno-Verdú' examines 510 music duets created by TikTok users to understand how TikTok empowers the decolonization of the music industry to challenge the historical dominance of Western recording studios.

Drawing from Laenui's (2006) process of decolonization, Vizcaíno-Verdú' argues that musical collaboration between non-Western TikTok users direct towards rediscovery and healing, dreaming, engagement and action for industrial emancipation. Because TikTok allows musical experimenting with genres, instruments, and removing the song's original genre, TikTok challenges to re-examine the foundations of musical creations. TikTok's model of musical co-creation drawing from cross-cultural influences and diverse TikTok users appropriate the industrial major music labels.

Methodological steps taken:

- Combining qualitative methodology of content analysis and semiotic interpretation to understand how music undergoes a process of decolonization within the industry through user-generated content on TikTok
- Two research questions formulated to answer the research objective:
    - 1: How does the process of social decolonization relate to TikTok's #SingWithMe duets?
    - 2: What characterizes musical decolonization on TikTok?
- **Semiotic analysis:** relies on the interpretation of signs and symbols as systems of meaning in communication cultures.
    - The researcher uses specific codes as a reference to study audiovisual content, in the case of TikTok #SingWithMe challenge the four stages of Laenui's social theory of decolonization: rediscovery and recovery, dreaming, engagement, and action
    - The choice of theoretical framework facilitates the research within the context of participatory culture in platformed environments
- **Steps of semiotic analysis:**
    - Collection of a representative sample of #SingWithMe challenge videos
    - Inductive and qualitative observation and coding of each video using Atlas.ti 23 software
    - Writing down field notes of cases with analogous practices of the decolonization process
    - The ultimate goal is to identify the visual, auditory, and gestural signs based on the four stages of social decolonization.

    - The coding based on four stages of the theoretical framework allows coding as systematic classification, interpretation, and analysis of emerging discursive patterns in the music videos
- **Data sampling and collection - walkthrough method and scraping:**
    - Navigating and interacting with TikTok's interface to understand its cultural and social references in relation to music
    - Directing observations towards the study of musical duets on TikTok
    - Accessing TikTok After for half-an-hour daily (for 59 days), the researcherl identifies various contents that included hashtags such as #DuetMe, #Duet, #MusicChallenge, and others
    - To manage the many different music challenges, the researcher applies hashtag analysis using scraping technique which means data and information extraction from websites in bulk using software through a Python 3.6 node package
    - The researcher uses search terms "duet" and "music" to find five most recurring TikTok hashtags: (1) #SingWithMe; (2) #DuetMe; (3) #DuetWithMe; (4) popcornduet; (5) #singingduet
    - After choosing the most popular one, #SingWithMe, the researcher downloads all posts on the platform that used the hashtag collecting a total of 979 videos at the time of extraction (April 2022).
- The researcher uses the walkthrough method to determine the nature of the analyzable units: the criterion is to select videos where TikTokers invite other users to perform the lyrics of the song as indicated in the challenge instructions. To collect these videos for analysis, the researcher employs using musical ID of the video

Critical Discourse Analysis

Sadler (2022) approaches protest music on TikTok through critical discourse analysis to examine how protest songs intersect with connective action as a logic of social movements and afford expression, particularly through individualistic participation. Sadler explores how TikTok affords interaction with protest music in online spaces by targeting a specific case of TikTok protest music, You About To Lose Yo Job as an object of discourse analysis. Sadler identifies three emerging themes through discourse analysis: "lip-syncing as tool of defiance and reclamation of space, the use of hashtags to game a commercialized platform, and the decontextualization or loss of the essence of protest music" (2022, p. 8). While TikTok as space and with its features like green screens and amplifying user content can create new audiences and venues for music, users also co-opt capitalist practices through gaming hashtags and blurring the connection of protest origins, movement affiliations, and the function the music serves. Yet, the blurring does not erase the potential of the music for resistive storytelling.

Methodological steps taken:

- The object of critical discourse analysis: You About To Lose Yo Job song as a background sound
- The videos with the song are viewed as cultural texts with specific meanings, hierarchies of action, and social practice
- The researcher views a set of videos as texts of personal expression and connective social process
- Videos are influenced by the context of the social movements they are part of
- The researcher traces the remixes created from the original clip of You About To Lose Yo Job

- Because of the sheer number of the remixes, the researcher selects a representative sample from one clip (Lord Sky remix)
- The sample is the first sound that comes up as search result proving its popularity
- The TikTok page for the sound shows how many times the remix has been used in TikTok videos (3,941 times). Because the remix is so prominent, there is a large amount of TikTok videos as audiovisual data
- The researcher does a preliminary viewing of the videos with the same tag to have an overview of the content that in this case shows a high level of variation
- Each video associate with the sound is analyzed in the aggregate as both visual and audio texts that express dominant and subordinate ideologies of social movements
- The sound is is systematically and thematically coded to explore the ways which creators express themselves through the protest song
- The researcher views the video tag multiple time over a course of time (a month) to find emergent themes to note similarities and differences and how the videos reinforce dominant ideologies
- The researcher pays key attention to
- Emotional expressions the individual content creators show to their networks through their interpretation of the song
- Expressions of positive emotion
- Expressions aiming to connect and create unity within the perceived social movement
- Looks at both visual and audio elements in unitu building
- Final focus on what uses of the platform were common and absent in the protest music TikTok videos
- The researcher organizes data using a constant comparative method that helps to create abstract theoretical categories from data and to focus on similarities and differences
- The researcher uses open coding (grounded theory method analyzing qualitative data) to connect emergent themes to the theoretical framework of the study
- After open coding the researcher uses axial coding (identifying larger themes relevant to the research) to create a connection between codes
- During the final stage, the researcher utilizes selective coding (choosing the core concept from the categories to form an overarching theme and connects with the research question) to delimit the core themes and discovers the three main thematic categories

Visual Approaches to Social Media

Visual approaches to Social Media are diverse, so this section discusses some of the larger challenges with working with visual materials as well as some of the well-known methods that can be used with them.

A first note is to be aware how to properly save the visual media you are analyzing. You will likely want to find some way to save an offline copy of any images you are researching, as you can easily lose access to images on the internet through the hosting website changing, the users being banned, or merely forgetting to properly structure your bookmarks. Have a separate folder, or use Zotero to keep images. Also, depending on your research topic, you might want to take screenshots that also include comments and the author’s captions of the images.

Hand (2017) notes three major methodological issues to image research on social media- the sheer volume of images makes it hard to pick appropriate research subjects, the production and circulation of the images are different from print meaning previous methods of meaning making are inappropriate, and establishing contexts for the images are difficult due to the malleable nature of social media.

To answer these challenges, you as a scholar should know how to acquire images to analyze that match your research topic, a skill developed through knowledge of where to go on the internet for visual images as well as a deep understanding of what your research topic is. The second issue is solved by not only reading analysis from scholars of physical media; an awareness of how scholars of images online understand them will be valuable for you. Finally, the question of context will depend on your answers to the previous two questions- having familiarity with your research topic and knowing how digital scholars have addressed these questions will curtail how you understand the context of the images.

When examining non-text data, such as images, there are various approaches you can take. Pennington (2017) notes the following possible methods or approaches- Compositional interpretation, quantitative content analysis, qualitative content analysis, document analysis, a visual sociological or anthropological approach, semiotics, iconography, discourse analysis, visual social semiotics, and a multimodal approach. Detailing all of these is beyond the scope of this section, but an understanding of the broad strokes should allow you to find more information, either in this guide or through outside research.

- Compositional interpretation focuses on the appearance of the image on its own. Look at the content and try to understand what the image is portraying. One idea from Pennington is to see the comments for if others are interpreting the image the same as you are.

- Content Analysis classifies the data into meaningful categories. Use inductive methods to produce codes and themes that reflect surface level or deeper symbolic meaning.

- Document analysis treats the images as historical data to be analyzed to show how individuals experience their lives.

- Cultural studies examine the relation between production and practices concerning the images. Consider the context of the image, when and how audiences view it as well as the context of the production of the image. Semiotics is a natural next step.

- Semiotics is a detailed account of the meaning an image produces. Consider the image and the composition as a sign that produces a meaning.

- An Anthropological or Sociological approach treats the images as communicating historical, social, or cultural information. What is depicted and how they are represented is what is critical.

- A different cultural approach is iconography, which asks what is in the picture, what ideas are attached to those objects, and finally the intrinsic meaning of the image through the value’s it impacts which can differ depending on the viewer.

- Discourse analysis entails examining the documents multiple times to find key themes to learn what meanings are assigned to particular images or words. Refine these themes as you develop them through recursive interaction between document and analysis.
- Visual Social Semiotics focuses on audience reception to image, while a multimodal approach aims to understand the multiple modes of interaction possible with documents, examining many at the same time. These two approaches are closely linked.

Ethnographic Approaches to Social Media

Ethnography is an approach to understanding a culture. It is most closely aligned with anthropology as a discipline, though has spread throughout academia. Ethnography uses participant-observation, a term meaning that the researcher both participates in the culture they are studying as well as observes how the culture works. For more information on how to conduct ethnography, go to the guide here. Digital ethnography is a method that attempts to understand how meanings are assigned and attached to technology and how cultural experiences are enabled by digital spaces, such as discussion groups, social media platforms, and chat rooms (Kaur-Gill &Dutta, 2017).

Ideally when conducting an ethnography, you should participate in the group you are studying as well as observe how they operate. This means being social, and posting actively. You will likely end up conducting interviews as you do this. Even if these are not explicitly formatted as interviews, you could very likely end up talking one-on-one with someone, so some familiarity with interview techniques would be useful. Also, the line between ethnography and auto-ethnography can be blurry sometimes- you might end up creating music if you are doing an examination of musicians on social media, for example or post your own art. These experiences are valuable and are worthy of separate analysis. Note, however, that it is not a requirement to participate. “Lurker” (online slang for watching a community without posting to it yourself) digital ethnographies are not uncommon, especially as many users of social media do lurk.

The question of “field site” is a big change from physical ethnography. When choosing a field-site, you should be able to explain why you picked the locations you did- are they the most popular and well-known? Do they intersect with your topic in interesting ways? You can consider a particular website or forum your field-site, but many websites are far too large to approach like this- there’s no way you can reasonably say you conducted an ethnography of “Facebook”- there’s too much for one researcher to ever find. You can focus specifically on a particular community (Stewart (2017) conducted an ethnography of academics on Twitter, for example). Alteratenly, you could view each individual account you might conduct ethnography on as a unique “fieldsite” to require its own process of enculturation (as Jackson (2023) does in a ethnography on streamers on Twitch. Each Twitch channel is treated as an individual fieldsite).

Digital Ethnography of TikTok

TikTok is not only a center for youth culture that provides space for diverse users, but it is also inherently content-driven where the TikTok users and creators engage with the platform and content rather than with each other and so establish TikTok’s own cultural atmosphere (Devlin, 2021; Zhao, 2024). However, TikTok research considers the platform as a communicative

environment and space for self-expression. Because TikTok research is a new, emerging field, this guide offers practical examples and case studies from published research projects within the past few years (2021-2024).

Methodology examples from different studies:

Schellewald (2021) utilizes digital ethnography to look at the fleeting stream of TikTok videos as cultural artifacts. Instead of overinterpreting individual videos, Schelleweld operationalizes a contextualist approach to focus on the videos' "embeddedness within the broader background of shared trends, memes, or platform-specific languages" (2021, p. 1440). As TikTok trends come and go and new trends emerge quickly, it makes the nature of the videos ephemeral together with the FYP feature of scrolling through multiple videos at once (despite that the videos themselves do not disappear). Rather than counting the number of videos, the ethnographic approach provides a longitudinal perspective and the time spent on the field (TikTok) helps to understand "forms of expressions in their constant (re)use and variation on the platform" (Schellewald, 2021, p. 1440). Schellewald's exploratory study maps different forms of communication encountered on TikTok as a digital field site. Instead of doing an ethnographic study of specific user groups, Schellewald crafts a detailed description of TikTok's communicative forms that can provide a starting point for complete ethnographies of TikTok cultures:

The methodological steps taken:

- Routine use of TikTok for 6 months
- Scrolling through "For You Page" 30 to 60 minutes daily
- Scrolling guided by a spreadsheet document as a field diary
- Spreadsheet as the central form to gather data in an aggregate form
- Individual videos watched and analyzed on the platform
- No downloaded and stored content
- Screenshots are taken only once as needed for illustrative purposes
- The spreadsheet diary is set up as follows:
    - **Vertical axis** to note individual TikTok trends and groups of videos, naming them, and entering a short description of their content and style. Trends are continuously (re)grouped by identifying common themes and shared formal characteristics. Sorting and linking individual clips as significant cases of specific groups of videos. The growing spreadsheet guarantees and enables the exploration of a broad variety of communicative forms on the platform. With the significant increase in the number of trends, the focus is shifted to individual trends more closely - a process of re-evaluation of cases and hashtags assigned to them to survey videos using similar elements like songs
    - **Horizontal axis:** if the table extends to accumulate lots of individual cases for already identified clusters, the search switches to other thematic groups of videos. Scrolling until encountering a video that does not fit already identified clusters and then searching similar videos to those as described above and through associated hashtags. The spreadsheet makes visible what type of content the researcher has already encountered and hence helps to find new to avoid being stuck in the feedback loop
- While TikTok is public by design and most users are assumed to be aware that their content can reach larger audiences, the ethical solution still is to create an aggregate document that links only to the videos on the platform leaving control of the content to

the creators (for example if they want to remove the videos). Similarly only videos or creators with public recognition selected to be discussed in the publication

Southerton's (2021) examination of TikTok as affective space where healthcare providers cultivate information and connections with the viewers during the first year of the pandemic between March and November 2020 provides a slightly different approach how to identify, gather, and store the TikTok data. The research utilizes the digital ethnography method inspired by Barnard's (2018) digital ethnographic content analysis (DECA) which integrates the analysis of the form of the platform:

- **The methodological steps taken:**
- Uses applications search function for keywords such as "covid," "coronavirus," "doctor," "nurse," "healthcareworker" to view videos
- Tracing videos and looking for further content by clicking hashtags on videos to identify other relevant content and creators
- Observations are undertaken weekly, usually 1-3 hours at a time
- Reading through comments on videos to observe interactions between creators and audiences
- Taking fieldnotes and screenshots
- Downloading relevant videos
- Six accounts chosen for in-depth analysis basis on the prominent use of the hashtags the researcher follows
- Accounts chosen based on posting videos regularly (every few days) and that counted as microcelebrities (referring to engagement with the audience)
- Focus on three different hashtags, #doctorsoftiktok, #nursesoftiktok and #healthcareworker, to offer a good overview of the kinds of content Southerton covers in the article.

Cerretani (2023) draws from a digital ethnography approach to approach TikTok through algorithmography of self-making. The premises of Cerratani's exploration differentiate TikTok from other social media platforms like Instagram and Facebook because of TikTok's highly tuned algorithm and the FYP delivering algorthimized version of the users. Cerretani approaches the algorithms and anthropology through the intimate ethnography of Tik-Talks with his sister with a chronic pain condition. By this, Cerretani refers to the processes of his ethnography, participant-observation, "Tik-Talks", and work with the TikTok Ethnography Collective.

The Tik-Talks are Cerretani's and his sister Alanna's discussions about their experiences of using TikTok and self-making practices related to the FYP. For example, in their first recorded Tik-Talk video, the siblings discuss what they have been seeing and learning from TikTok, talk about the videos they have shared with each other, share related content, and co-analyze videos. Cerretani's research focuses particularly on Alanna's experiences on TikTok and their Tik-Talks to offer an insight into how algorithmically controlled social media platforms provide a place for people to learn about themselves in intimate and exploratory ways. Cerretani concludes that ethnographic methods to understand how algorithm plays a role in self-making on TikTok of those with chronic pain seeking to diagnose and perceive themselves in the thicketed world of (mis)information. The research highlights the importance of taking TikTok and emerging social media sites seriously as spaces of knowledge-making practices and new cultural expressions. Cerretani argues that people appropriate applications like TikTok for their

own purposes that conflict with the corporate interests and cultural (re)production of the platforms.

The methodological steps taken:

- **The ethics of working with a sibling on a sensitive research topic:** Siblings's willingness to be involved in the research discusses during the first Tik-Talk
- Willingness repeated as a topic throughout the research process
- Topics the sibling felt comfortable discussing in a public forum clarified
- Sibling understands the potential consequences of sharing intimate life details
- Sibling has read and approved every draft of the article
- Sibling has made sure her words and story are well conveyed
- Sibling made sure nothing was out of the scope of what she wanted to share
- Sibling required anonymity (in written form) for names of persons she was interacting with
- Sibling, Alanna Cerretani, wants to be named to tell and have ownership of her story

Methodology: Algorithmography: "Dissuade a simple reading of algorithms as solely technical, and considers algorithms as socially informed, culturally constructed, complex, sociotechnical systems" (2023, p. 40).

- The first steps to developing algorithmography are active attempts to curate and control FYP with close consideration to
- The time spent on a video
- Liking
- Following
- Commenting
- Also close considerations to more passive engagement with the app, such as
- Late-night scrolling
- Unconscious decision making
- Seeking entertainment as compared to interest or knowledge seeking that comes with the more active side of the scrolling cycle
- Reverse-engineering algorithm who the algorithm thinks the researcher is and shaping and defying the algorithm through engagement: recreating anthropological dialectics "between analogue and digital, human and machine" (2023, p. 39)
- With active engagement and critical focus on each action, the videos quickly change based on the actions taken
- Through autoethnographic reverse engineering of the algorithmized self, the methodology provides "a partial window onto dominant cultural contexts of which algorithms are a part of" (2023, p. 40)
- Algorithmography shows how algorithms are socio-economic systems are "creations steeped in culture as reflected through an algorithm-engaged autoethnography or algorithmography" (2023, p. 40)

Methodology 2) Tik-Talks: The discussions of the videos and users the research participant relates to and strays from, how the participant started using TikTok, which TikTok communities the participants belong to or follow

- Two types of Tik-Talks: non-recorded conversations and recorded conversations that were posted on TikTok
- During non-recorded conversations, the researcher and participant casually scroll through TikTok and discuss the videos they see

- Recorded Tik-Talks are more structured around the experiences of using TikTok but still casual
- The researcher searches videos about ths chronic pain condition, watches them, evaluates the accuracy of the videos, and then discusses the content and feelings related to videos with the participant
- Tik-Talks have a strong autoethnography element from the researcher's side
- The researcher writes notes about the talks, videos, and feelings they evoke for analysis
- Tik-Talks mediates the relationship between the researcher and the participant and discussion about the videos of the chronic pain condition provides a more nuanced understanding of the particular chronic pain TikTok community

Zhao (2024) provides an interesting insight into TikTok research methods and ethics through experimental digital ethnography that Zhao conducted both as a researcher and a digital content creator resulting from social restrictions during COVID-19. Zhao explores the perceptions and performances of masculinity among young Uzbek men in Uzbekistan. Zhao created 50 TikTok videos between 2021 and 2022 and received more than 300,000 likes in total for the videos. Through his ethnographic work, Zhao examines how his own positionality as a content producer, an East Asian man, an Uzbek-speaking Chinese, and an international PhD student can shed light on the performative nature of self-presentation and being a content creator as a medium of inquiry to study online and offline realities. Zhao argues that by leveraging these multiple positionalities, he reached a diverse economic and cultural audience with a wide range of social backgrounds.

Zhao's digital self-presentation led to multiple group connections on TikTok and "served as a stimulus for researching masculinities, providing insights into the dynamics of race, migration and nationalism among Uzbek youth, with critical reflections on the performative dimension of content creation" (2024, p. 6). By presenting himself as an East Asian man in digital videos, Zhao achieved a vantage point to explore the intersections of masculinity and race within Central Asian society. The visibility and popularity of Zhao's TikTok videos broadened the reach of his research participant recruitment and served as a substantial source of ethnographic data during the pandemic. Zhao argues that the dual role as an agent in research and object of observation in the TikTok videos challenges conventional research gazes and relationships, yet the digital platforms pose ethnography with new constraints and ethical dilemmas. The intentional and selective presentation of various positionalities allows the researcher to gain more agency and expand research possibilities especially when there are physical, cultural and social restrictions. However, the research as an object of the videos can expose the researcher to become the subject of observations and discussions among the participants.

Being a video creator can similarly expose the researcher's digital biography to mental risks, such as being targeted with hate speech, racism, sexism, and nationalist sentiments that are often amplified by the Internet. The research participants are subjected to ethical concerns, such as regarding research participation and informed consent. In Zhao's case, the videos researched millions TikTok users in some cases, and as a consequence, a substantial number of the users may not have actively provided informed consent or even intended to participate in the research. Such interactions pose new challenges to defining research participation and obtaining informed consent. Zhao consistently highlighted research objectives and risks, comments, and private messages, and sent private messages to participants to seek consent for material aimed for publication, yet many users did not respond adding challenges to obtain consent from all the participants.

Methodological steps taken:

Experimental digital ethnography: Broadening the experimental ethnography conventionally employing filmmaking techniques to explore and interpret everyday cultures to encompass TikTok videos

- Differing from conventional experimental digital ethnography as the researcher transitions from a collaborative video production approach to an independent and agentic positionality both an ethnographer and a TikTok video creator
- Thematically analyzing TikTok videos the researcher creates
- Created TikTok account in 2021 as a result of strict COVID-19 restrictions to connect with locals and recruit participants
- The researcher's first TikTok video explains the rationale behind the account:
- The researcher introduces himself
- The researcher provides an overview of the research objectives
- The researcher elucidates the purposes behind creating the video
- The video is pinned to top of the researcher's TikTok profile for easy access and visibility
- To take into consideration the viewer who has not seen the first video, the researcher makes continuous efforts to inform them about his role as a researcher delving into people's perceptions of Uzbek masculinities
- Positive response to the first video serves as a strong motivator as the platforms enable ethnographers to expand research opportunities

- **The researcher's diverse positionalities shaped interactions with viewers and followers both online and offline. These positionalities are such as**:
- Gender (cisgender man)
- Age (millennial)
- Education (international doctoral student)
- Class (middle class)
- Race (East Asian)
- Nationality (Chinese)
- Language skills (fluent in Uzbek and Uyghur)
- Marital status (unmarried)
- The videos where the researcher speaks Uzbek (the sole official language of Uzbekistan and the prevalent language in the rural and regional areas of the post-Soviet republic) receive significant attention from young viewers and followers hailing from these regions
- The language choice as method guides interactions with a demographic that exhibit a relatively higher level of religiosity and predominantly belong to lower social classes
- Positionality as a young Chinese man draws the attention of a cohort of young Uzbek men who display a keen interest in East Asian cultures.
- The open display of the multiple positionalities in TikTok video is a participant recruitment and data collection method
- Close observation and employment of popular video formats and background music prevalent among Uzbek and other Central Asian TikTok users
- To ensure cultural appropriateness, the researcher seeks help and insights from Uzbek friends
- Careful consideration of the friends' comments and feedback on each video
- In situations that require an in-person meeting with a follower, the researcher consistently informs about the research purpose and acquires explicit written or verbal consent before collecting any data

- The researcher receives common questions in the comments and private messages that allow him to respond and repeatedly introduce himself and his research. The frequently asked questions are:
- ‘Who are you?’
- ‘What are you doing in Uzbekistan?’
- ‘Why do you choose Uzbekistan?’
- The researcher informs the viewer about the possibility of utilizing information from TikTok for doctoral research, following the ethics approval obtained from the university and the host institution in Uzbekistan
- To strategically foster digital intimacy, the researcher proactively answers frequently asked questions in both the comments section and private messages, employing the language preferred by the individual followers, which includes Uzbek, English, Russian and Mandarin
- Certain well-informed followers introduce the researcher to others within the TikTok community, fostering both online and in-person interactions
- Certain online interactions evolve into offline gatherings where the researcher meets some followers in person for more in-depth discussions on Uzbek masculinities
- The utilization of videos, comments, and private messages facilitates the development of meaningful digital connections and intimacy with both followers and other potential informants

Additional resources for TikTok ethnography and digital ethnography

TikTok Ethnography Collective: https://www.tiktokethnography.com

Autoethnography and Video Games

There is another option for researchers who want to utilize ethnographic methods: autoethnography. Autoethnography is not simply writing autobiographically; researchers apply literature and theory to their own experiences to gain a broader understanding of the sociocultural and historical context of the time (Ellis et al., 2010; Adams et al., 2014; Adams & Herrmann 2020; Shome, 2021). Writing an autoethnography may not seem like rigorous research at first, but balancing ruminations on one’s own experiences with insights gained from research is a tricky process. Experiences may be too raw for researchers to write about, or circumstances may arise that distance the author from them. Writing an autoethnography, as challenging as it may be, is ultimately a rewarding experience that enables a better understanding of one’s own sense of self and where they fit in the puzzle that is society at large. For more detailed examinations of autoethnography, we recommend reading Ellis et al., (2010), Adams et al., (2014), and Adams & Herrmann, (2020).

In this section, we will review how some researchers have used autoethnography as a method to interrogate gaming culture, the relationships between gamers, their own lived experiences as gamers, or digital culture at large. These texts act as useful models for future researchers. Here we pay special attention to the ways in which the authors crafted the explanation of their methodology:

Note: Most, if not all, of these authors first describe autoethnography in their methodology sections. Be sure to review the texts we mentioned above–they are quite informative and can act as a jumping off point. Make sure to understand at least the basics before diving in–but don't forget that sometimes the best lessons come from unexpected sources.

Borchard (2015) used autoethnographic methods to examine the "abstraction of violence and social relations, and the formation of my Self" in gaming series *Grand Theft Auto* [GTA] (p. 446) as well as the role-playing game *Super Columbine Massacre RPG!* [SCMRPG]. Borchard (2015) interrogates the assumed relationship between an inclination towards violence and playing video games as well as the extreme reactions (emotionally and in terms of popularity) to both *GTA* and *SCMRPG.* For this article, Borchard (2015) played GTA 3, 4, and 5 for over a 100 hours per game; they also played SCMRPG for 10 hours. Taking on the role of a "participant observer" in the virtual worlds of these games, Borchard (2015) compared their own values to the those the game seemed to promote, and "how [their] social positioning and emotions are reinforced and/or affected through gameplay" (p. 447). Autoethnography acts as a useful method here in that it allowed Borchard (2015) to see how the game and other parts of their life are interconnected and inform one another, how the game is informed by cultural patterns in America at large, and their own cognitive dissonance when playing SCMRPG.

An important quote from Borchard (2015) on the power of autoethnography: "Cultural studies can arguably boil down to analyzing the meaning people make of cultural products in their lives and in reproducing our social world. Autoethnography additionally allows for critical consideration at an individual level of how meaning making reflects social inequality, personal identity, and the promotion of values" (p. 453). Example: How does the autoethnography of a disabled gamer reveals the ableism of the hobby? (See Romano, 2014) Consider if researchers' work can utilize autoethnography as a method, especially if questioning or deconstructing aspects of identity.

Jordan (2014) wanted to know if games like World of Warcraft [WOW] could potentially aid in therapeutic interventions for individuals, couples, and families. Jordan (2014) used their own experience playing WOW and took note of any effects playing the game had on "violent thought, behavior, and intimate relationships." The researcher also conducted interviews and tracked themes of work, nostalgia, and connection. While Jordan (2014) concluded that neither themselves nor the vast majority of people they interviewed were negatively impacted by playing the game, Jordan (2014) did note that their study is, as most autoethnographies can be, quite specific. Once again, the researcher begins with a positionality statement and establishes in which social context they are writing. The researcher also included *why*, exactly, it matters *to them personally* that the research be done. This is another aspect of autoethnography; there are, to a certain degree, personal stakes. Jordan (2014) played 251 hours of WOW with four different characters in order to be exposed to as much of the game and community as possible. Jordan (2014) played in various "Realms" or on different servers in order to gain data that was specific (gathering an English speaking population) and broad (playing on the U.S. server which spans across the country). Since Jordan (2014) also conducted interviews, there was a need for informed consent forms and Jordan also needed to get approval from Appalachian State's IRB. While autoethnography does not necessarily require IRB approval, if other participants are involved in the project then it may be necessary. Keep this in mind.

Kout (2019) was interested in the educational potential of video games and their potential use as a tool for critical pedagogy. Kout (2019) reviewed the approaches to autoethnography introduced by Ellis (2004): personal narrative wherein the focus is on the individual as the phenomenon; indigenous or native autoethnography, which positions the subject in relation to

colonial forces of power; reflexive or narrative autoethnography, wherein authors work through their own stories in relation to culture at large; becoming a “complete member” researcher, or someone who is assimilating into the group they are observing and recounting that experience is an option; ethnographic memoir, or an account of the research practices that went into a project; and, finally, contingent autoethnography, or when “the author’s plans consisted in studying others. In the process of doing so, the researcher comes to understand themselves in a new way” (Kout, 2019, p. 64). Kout (2019) employed personal narrative and reflexive autoethnography. Kout (2019) used two main data sets: written memories and accounts of their own time playing games, and observational data wherein the researcher accounted for “the overall length of the observation period, the length of my play sessions, and the scope of what constitutes my video gaming experiences” (p. 70). Using elements from observing others to observe the self may be something for future researchers to consider.

Moy (2021) used autoethnographic methods to understand their experience at an e-sports event. Moy (2021) decided to use autoethnography due to the proximity they had towards the subject, and reflexivity was key as they worked through the project. Reflexivity is important in autoethnography, since “memory is fallible, that language is limited, and that people who share the same experience will have different “truths” about the same experience” (Ellis et al., 2011, as cited by Moy, 2021). Recognizing the limits of autoethnography and the personal experience of the researcher is critical. Another important distinction Moy (2021) made is that autoethnography varies in tone; some authors are aiming to evoke emotion, while others are using a more analytical lens. Thus, even within the method of autoethnography, there are stylistic differences and what some may call a sort of “scientific” and “humanistic” divide. Researchers should experiment with style and see what suits them.

Romano (2014) used autoethnography to explore the ways in which narratives of accessibility are incomplete and also to bring to light how gaming can be a sort of “one-size-fits-all” hobby that may exclude disabled people. Romano (2014) succinctly argued that
It is not possible to separate yourself from your research…the poetic process of autoethnography allows me to connect my own frustrations with accessibility and disability to a much broader, cultural context. My life as a disabled gamer has informed my interest in the subject…through engaging with the process of storytelling, I will be able to show the ways in which accessibility affects how I conduct my life. The stories that I tell will serve as a cultural indication of the ways in which a disabled individual lives within a society [that does not prioritize them]. (p. 12) In what ways are you interwoven with your research?

Steinmetz (2018) was interested in the “punitive and carceral elements” of the *Silent Hill* franchise (p. 265). To study this, they used a combination of ethnography and autoethnography. Importantly, Steinmetz (2018) also looked at player guides and other paratexts to help make sense of *Silent Hill.* Steinmetz (2018) accounted for any mention of punishment or prison, making notes on elements including “narratives, scenery, plot devices, characters, monsters, or other game elements” and using audio and visual capturing technology to record the experience of playing through the series. This data was then uploaded into Atlas.ti, a qualitative data program.Steinmetz (2018) noted using grounded theory and really prioritizing the response of theory to the data rather than a response of data to the theory. Autoethnographic elements came in the form of notes and journaled recollections of the researcher’s experiences and emotions playing through the series: “Rather than eschew ‘moments (or prolonged periods) of empathy, embarrassment, fear, nervousness, dilemma, and so on’ autoethnographic approaches accept the lived experiences of the researcher as valid territory for academic analysis” (Jewkes, 2011, p. 64, as cited in Steinmetz, 2018, p. 270). The autoethnographic

reflections collected by the researcher therefore informed how Steinmetz (2018) "[made] sense of said content through grounded theory analysis" (p. 270).

Using grounded theory and being flexible about theory can provide important insights otherwise missed if focusing on one rigid framework. Stokes (2024) examined the role that Princess Toadstool (also known as the one and only Princess Peach) played in both *Super Mario Bros 2* the imaginations of American women who played video games in the 1980s and 1990s, using a combination of ethnographic, autoethnographic, and interview methods. Stokes (2024) argued that Princess Peach's introduction as a hero within the game, while an attempt at inclusion by the developers, actually presented another example of the Euro-centric and fatphobic body image standards of the 1980s and the 1990s. This not only influenced the confidence and relationship to the game that female players had but also the characterization of Peach as a damsel in distress. The author wrote that their main method was ethnography, but also did an online survey. The autoethnographic aspect of their piece was relatively minimal, but they were still "better able to understand and evaluate [their] own involvement with the game" (Stokes, 2024, p. 3). These reflections were included alongside the interviews the researcher conducted. The author situates herself in the same context as the little girls growing up with Euro-centric beauty standards. Importantly, Stokes (2024) noted that "Looking back at **my** *[emphasis added]* and my informants' recollections of our time playing *Super Mario 2.,* we can get a view of American popular culture's gender representation in the 1980s and 1990s" (p. 12). Again, the author reflects on their own experience but is very careful not to ignore how that experience is contextualized with the larger sociocultural climate. Follow this lead.

Uotinen (2010) gave an overview of how autoethnography may be used as a method to conduct "gender-sensitive cultural studies of technology" (p. 161). While Uotinen (2010) noted arguments that autoethnography is too autobiographical to be a rigorous research method, they argued that autoethnography is still quite useful as it can provide an important perspective from a specific context which must then be contextualized in a broader sociocultural sense. Importantly, Uotinen (2010) condensed the advice offered to autoethnographers: "it should be personal and research-like, evocative and analytic, descriptive and theoretical at the same time. Autoethnography should also have artistic quality, independent of whether it takes the written or performative form. In addition, it has been mentioned that autoethnographic research should aim at offering care and support as well as producing change in the world and people" (p. 165). While these demands are impossible to *completely* meet, what really sets autoethnography apart from other research methods is its ability to *evoke* strong emotions, sentiments, and motivation in people, which Uotinen (2010) argued may be seen as something to its detriment.

[Author's Note: As someone who has written autoethnography myself, I think autoethnography's ability to evoke emotions is a *strength*, but Uotinen (2010) situates it as a problem. Perhaps this is my creative writing background speaking…it is up for the reader to decide].
Uotinen (2010) contended that, despite the ~emotional evocation~ of autoethnography, it was still worthy of doing since it prioritizes situated knowledge; it makes it possible to chart the day to day experiences of an individual or group, which is far more difficult if the researcher is conducting interviews or used another method; it is ethical because the researcher is using their own lives as material rather than using anything from someone else's [Author's Note #2: Autoethnography does have other risks, though, particularly emotional burnout or depression. This is especially true if writing an autoethnography on one's own trauma. Be kind to yourselves!!]

Uotinen (2010) synthesized the work of others on autoethnography and stated that the qualifications an autoethnography must meet are "the detailed description of its starting points

and positions, the density of its descriptions as well as the construction of its social and cultural contextualization and the way it offers comparisons. If one wants to achieve sustainable autoethnography also from the point of view of women's studies, one needs to make sure that research does not move only in the sphere of the private, but also in the social and cultural" (p. 167). Uotinen (2010) also mentioned "small autoethnography," distinguishing their own piece as an example of such work. "Small autoethnographies" consider the everyday, "small" themes of life, whereas "big" autoethnography deals with deeper, more traumatic events in life. Understanding this can help future researchers understand the scope of their own project.

Uzunogullari (2023) used autoethnographic methods for their mediation on how video games allowed "armchair travel" during the COVID-19 pandemic. Viewing gaming as a ritual, Uzunogallari (2023) contends that during the pandemic, "armchair travel," or a form of escapism via leisure activities should be more thoroughly investigated, particularly in relation to video games, which deliver these experiences "through aesthetic and embodied experiences in that they provide not only a means of escape from a confined physical space, or reduction in anxiety but also new pleasures, emotions, and associations with one's body, environment, and time" (p. 143). Uzunogullari (2023) concludes by urging researchers to use autoethnographic methods in connection to video games as it can uncover new insights. Uzunogullari (2023) first describes their methodology, but then goes on to detail the context of their research and their positionality. This is something to keep in mind with autoethnography: while it is a methodology that uncovers both personal and cultural insights, it is imperative to keep in mind one's own position and also recognize that autoethnography runs the risk of being too insular and too specific. Good autoethnography is able to bridge the gap between the personal and sociocultural to gain new knowledge. Uzongullari (2023) used autoethnography to consider how leisure and armchair travel enabled escapism during the pandemic by reflecting on playing various games including *Horizon Zero Dawn, Red Dead Redemption 2, Hitman 2, Mafia 3, and Assassin's Creed: Valhalla.* Uzongullari (2023) did this via vignette, diary-like entries into a research journal. By documenting these moments in this journal, Uzongullari (2023) was able to go back and piece these together with the theory they were considering. Keeping detailed notes in the present can help writers when they type up their project in the future.

Villareal (2018) was also interested in the educational potential offered by video games, specifically how students would respond "when… asked to engage with a video game as a class text, use their engagement with a video game to make sense of other texts, and [understand] how reader-response theory applies to making meaning of video games as texts" (p. i). Describing their process, Villareal (2018) relayed that, "I used my interpretations of my observations and student work to piece together a narrative as a way of trying to address my research questions. I kept track of my observations in a notebook both during and after classes" (p. 104). The concept of using interpretations based on observation to craft a narrative that can be mobilized to answer bigger questions about society and culture is at the heart of both ethnographic and autoethnographic research practice. Keeping notes or journal entries was a tactic many of the authors featured in this guide used, so it is something to keep in mind for future researchers.

Clearly, autoethnography is a method that holds great promise for game studies. Looking to the above texts as models offers future researchers a base from which they may begin their own research. Importantly, autoethnography may seem like a less rigorous method, being based partially in subjective understandings of the world, but often the extent to which autoethnographers go to justify their own conclusions is far more convincing than the work of others who may feel they have less to prove. At the end of the day, autoethnography is just as

valid a method as any other, and researchers interested in using it must be equipped to produce work that may be held to rigorous standards.

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Uzunogullari, S. (2023) Armchair travel through video games: stories from elsewheres and elsewhens, Leisure Studies, 42:1, 133-146, DOI: 10.1080/02614367.2022.2153904

Villarreal, B. J. (2018). "It's Dangerous to Go Alone": An Autoethnography of College English Students Reading Video Games as Texts (Order No. 10784665). Available from ProQuest One Academic. (2047544327). http://libproxy.temple.edu/login?url=https://www-proquest-com.libproxy.temple.edu/dissertations-theses/dangerous-go-alone-autoethnography-college/docview/2047544327/se-2

Vizcaíno-Verdú, A. (2024). Decolonising the music on TikTok: “Let’s duet!” Revista Mediterránea de Comunicación, 15, 341–355. https://doi.org/10.14198/MEDCOM.24949

Zhao, Y. (2024). TikTok and Researcher Positionality: Considering the Methodological and Ethical Implications of an Experimental Digital Ethnography. International Journal of Qualitative Methods, 23, 16094069231221374. https://doi.org/10.1177/16094069231221374

Appendices

Additional readings and notes for Chapter 1

Readings on Qualitative Analysis

Creswell, J. W. (2017). Qualitative Inquiry and Research Design: Choosing Among Five Approaches (4th ed.). Sage Publications. Provides an overview of five different qualitative research approaches (narrative, phenomenology, grounded theory, ethnography, and case study) and discusses the key elements of each approach, including data collection and analysis techniques.

Miles, M. B., Huberman, A. M., & Saldana, J. (2013). Qualitative Data Analysis: An Expanded Sourcebook (3rd ed.). Sage Publications. Offers detailed guidance on various qualitative data analysis methods, including coding, categorizing, and interpreting data. It provides practical examples and case studies to illustrate different analysis techniques.

Maxwell, J. A. (2012). Qualitative Research Design: An Interactive Approach (3rd ed.). Sage Publications. Explores the process of designing qualitative research studies, from formulating research questions to selecting appropriate data collection and analysis methods. It emphasizes the interactive nature of qualitative research design and offers practical advice for conducting high-quality research.

Bryman, A. (2012). Analyzing Qualitative Data. Routledge. Covers a range of qualitative data analysis techniques, including thematic, content, and discourse analysis. It provides step-by-step guidance on how to conduct each type of analysis and offers examples from real research studies

Schreier, M. (2012). Qualitative Content Analysis in Practice. Sage Publications. Focuses specifically on qualitative content analysis as a method for analyzing textual data. It discusses the theoretical foundations of content analysis, different approaches to coding and categorizing data, and how to ensure rigor and reliability in the analysis process.

Gibbs, G. R., & Malterud, K. (2018). Qualitative Data Analysis: Explorations with NVivo. Routledge. Explores the use of NVivo, a qualitative data analysis software, in conducting various types of qualitative analysis, including thematic analysis, grounded theory, and content analysis. It provides practical guidance on how to use NVivo to manage and analyze qualitative data effectively.

Berg, B. L., & Lune, H. (2012). Qualitative Research Methods for the Social Sciences (8th ed.). Pearson. Covers a wide range of qualitative research methods, including ethnography, grounded theory, phenomenology, and case study. It discusses the theoretical foundations of each method and provides practical guidance on how to apply them in different research contexts.

Additional readings and notes for Chapter 2

Ethical challenges in different contexts:

- Denison & Stillman (2012) - studying ethical challenges in South Africa, as cited by franzke et al. (2020)
- Mukherjee (2017) - digital ethnography in Asia franzke et al., (2020)
- Domenget & Wilhelm, (2018) - discusses ethical concerns in France as cited by franzke et al. (2020)
- Heise & Schmidt (2014) - discusses ethical concerns in Germany as cited by franzke et al. (2020)
- Pentzold (2015) - discusses ethical concerns in Germany as cited by franzke et al., (2020)
- Ess & Hård af Segerstad (2019) - discusses ethical concerns in Scandinavia as cited by franzke et al., (2020)
- Seko & Lewis (2017) - discusses ethical concerns in Canada as cited by franzke et al., (2020)
- Bechmann & Kim (2020) - a cross cultural big data social media analysis based in Denmark and South Korea as cited by franzke et al., (2020)
- Whelan (2018) - discusses ethical concerns in Australia as cited by franzke et al., (2020)
- Honan (2014) - discusses ethical concerns in Papua New Guinea as cited by franzke et al., (2020)

Different platforms also have different cultures within themselves. See Hudson & Bruckman, (2004); Beninger et al., (2014); or Patterson, (2018), all of which are cited by franzke et al., (2020).

Involved subjects

The more vulnerable a population is, the more concern researchers should have to work to protect them from likely harms. These groups or ethical considerations include:

- “Downstream harms or harms after the fact (Harmon, 2010; Sterling, 2011; Markham,
- 2018 as cited by franzke et al., 2020)
- Minors (e.g. Robards, 2013; Hudson et al., 2004, as cited by franzke et al., 2020)
- Politically sensitive research (Kaufmann, 2019; Reilly & Trevisan, 2016 as cited by franzke et al., 2020)).
- Women (Luka, Millette & Wallace, 2017, as cited by franzke et al., 2020)).
- Groups (e.g. persons with disabilities) (Trevisan & Reilly, 2014; Hård af Segerstad,

- Kasperowski, Kullenberg & Howes, 2017, as cited by franzke et al., 2020)).
- Special emotional states such as grieving and/or trauma, illnesses; e.g.: suicide prevention (Eskisabel-Azpiazu, Cerezo-Menedez & Gayo-Avello, 2017, as cited by franzke et al., 2020));
- Griefsquatting (Klastrup, 2017); Digital Death (Gotved, 2014; Lagervist, 2013, as cited by franzke et al., 2020, p. 17)

IRE 2.0 contained the following questions, once more repeated in IRE 3.0:

- How are data being managed, stored, and represented?
- What method is being used to secure and manage potentially sensitive data?
- What unanticipated breaches might occur during or after the collection and storage of data or the production of reports? (For example, if an audience member recorded and posted sensitive material presented during an in-house research presentation, what harms might result?)
- If the researcher is required to deposit research data into a repository for future use by other researchers (or wishes to do so), what potential risks might arise? What steps should be taken to ensure adequate anonymity of data or to unlink this data from individuals?
- What are the potential ethical consequences of stripping data of personally identifiable information?
- How might the removal of selected information from a dataset distort it such that it no longer represents what it was intended to represent?
- If future technologies (such as automated textual analysis or facial recognition software) make it impossible to strip personally identifiable information from data sets in repositories, what potential risks might arise for individuals? Can this be addressed by the original researcher? If so, how? How will this impact subsequent researchers and their data management? (IRE 2.0, p. 9 f.; (franzke et al., 2020, p. 19)

The best current practices cannot perfectly anonymize data. Data security is therefore even more important.

Questions of definitions, understandings of what data is/represents:

- Hacked/stolen data - Is it ethical to use data that would usually be confidential but has been leaked accidentally or intentionally?
- Issues about accuracy of research - Can researchers depend upon data from external, commercial sources? What about biases or problematic representations?
- Differences between types of data - Aggregated sets, derived sets, and purchased sets of data all come with their own concerns
- Downloaded data - Does the data or metadata potentially violate the participants' privacy? What can be done about it?

Issues and procedures in collecting, managing, storing, & destroying data

- Data minimization - “The rule of data minimization in, for instance, the GDPR (2018), is to some extent conflicting with the very purpose of big data, namely, to query the data for answers within the scope of an overall research interest or research question with the aim to learn inductively. This is a completely different approach than within ‘normal’ quantitative approaches where hypotheses are driving the research. In order to make the full benefit of big data methods the researcher often finds themselves in a dilemma of wanting to ‘ask’ the data across time, different data points or a large volume of/diverse set of IDs or data subjects, yet wanting to fulfill the need for data minimization” (franzke et al., 2020, p. 20).
- Data storage vs. the (EU) right to be forgotten - For more information, see Tromble & Stockmann in Zimmer & Kinder-Kurlanda (2017) or Geiger et al. (2018)
- Deleting data - When do researchers delete data, and how?
- Databases, storing, archiving - “What data are stored as relevant and what are discarded as irrelevant? What happens to archives when data storage formats become obsolete? What factors determine, or later alter, the searchability of databases? What decoding information/formula is (or should be) stored alongside data to ensure future readability?” (franzke et al., 2020, p. 20)
- Data sharing - What is possible if large datasets are shared? Can they be properly anonymous? Big data analyses rely on social media sites to share data or allow them to collect data through API. Data sharing, transparency, and privacy have become big priorities. While the current strategy is to “secure privacy on the level of both who gets access and how many data points are provided” (Dwork, 2006, as cited in franzke et al., 2020, p. 20) this also comes with its own risks. Safe space approaches are therefore a major priority for internet researchers.
- Other considerations: “What are the primary purposes of the collected data that you are using? Is it possible that the original context influences/interferes with your own results?” (franzke et al., 2020, p. 21).

There are numerous other concerns regarding ethics in internet research:

- Conflicting interests between researchers and third parties → this is an issue of data ownership, particularly in instances when a project is being managed by multiple institutions. Where is the data stored, and who owns it?
- Is it ethical to utilize platforms like Amazon Mechanical Turk to gather data? Are those compiling this data being paid a minimum wage? Are there incentives at play that would ruin the credibility of the research or researcher?
- There needs to be greater ethical guidelines centering visual images. Because images are so visceral, researchers must take greater care when it comes to privacy and preventing harm. While researchers may not initially think sharing specific images is unethical, since conferences are recorded and journals are becoming accessible, researchers studying visual images must be vigilant.

Additional readings and notes for Chapter 4

Future Additions to the textual analysis section

I hope this has been helpful in providing you with some guidance as to how you might go about conducting a televisual textual analysis. Here are some further ideas I had but could not include that future researchers might want to add to this section:

- Breaking down types of analysis (visual, narrative, semiotic, etc.)
- Breaking down elements of cinematography and sound that could be helpful in analyses
- More explicit instructions on “coding”
- Further exploration of the importance of Barthes’ ideas about signs and symbols in film analysis
- Erving Goffman’s ideas about relative size for visual analysis

More readings and resources on discourse analysis

Rose, G. (2002). discourse analysis I: text, intertextuality, context, and discourse analysis II: institutions and ways of seeing. In Visual Methodologies: An Introduction to the Interpretation of Visual Materials (reprinted, pp. 135–186). Sage. In this book, two sets of chapters (titled: Discourse Analysis I: Text, Intertextuality, Context; and Discourse Analysis II: Institutions and Ways of Seeing) are specifically about the concepts of discourse and visual culture, intertextuality, discursive formation, power/knowledge, regimes of truth, and types of discourse analysis, as outlined by Foucault, as well as related discussions.

Brock, A. (2018). Critical technocultural discourse analysis. New Media & Society, 20(3), 1012–1030. https://doi.org/10.1177/1461444816677532. This paper presents Critical Technocultural Discourse Analysis (CTDA) as a methodological approach that can reveal the nuanced ways in which culture and technology converge in the context of the experiences of marginalized groups with technology. The paper presents the examples of Black Twitter and “subtweets” to illustrate the potential of this method.

Jaipal-Jamani, K., (2014). Discourse analysis: A transdisciplinary approach to interpreting text data. In Sage Research Methods Cases Part 1. SAGE Publications, Ltd., https://doi.org/10.4135/978144627305014526824. This example focuses on concepts and discourse analysis methods from three different disciplines: semiotics, critical theory, and functional linguistics. It can also help us understand how these three disciplines' concepts and analytical methods interact with a transdisciplinary approach to discourse analysis.

Yazdannik A, Yousefy A, Mohammadi, S. (2017). Discourse analysis: A useful methodology for health-care system researches. J Educ Health Promot.6:111. doi: 10.4103/jehp.jehp_124_15. PMID: 29296612; PMCID: PMC5747223.
Discourse analysis: A useful methodology for health-care system researches

Jørgensen, M. W., & Phillips, L. J. (2002). Discourse analysis as theory and method. Sage. Explores discourse analysis's theoretical foundations and methodological approaches, emphasizing its interdisciplinary nature. It discusses how discourse shapes social reality and influences various fields of study, providing readers with a thorough understanding of discourse analysis as both a theory and a method.

Potter, J., & Wetherell, M. (2012). Discourse and social psychology: Beyond attitudes and behavior. Sage. Discusses the intersection of discourse and social psychology, moving beyond traditional approaches focusing solely on attitudes and behaviors. It examines how discourse constructs social realities and influences psychological processes, offering a nuanced understanding of the relationship between language and society.

Fairclough, N. (2013). Critical discourse analysis: The critical study of language. Routledge. Presents critical discourse analysis (CDA) as a framework for critically examining the role of language in reproducing power structures and social inequalities. It provides theoretical insights and practical tools for conducting rigorous discourse analyses in various contexts.

Wodak, R., & Meyer, M. (Eds.). (2015). Methods of critical discourse studies (2nd ed.). Sage. Offers an overview of methodological approaches, including multimodal discourse analysis, corpus linguistics, and ethnography, providing readers with a toolkit for conducting critical discourse analyses.

Van Dijk, T. A. (2008). Discourse and context: A sociocognitive approach. Cambridge University Press. Introduces a socio-cognitive approach to discourse analysis with emphasis on the role of context in shaping discourse production and interpretation. It explores how social structures, cognitive processes, and situational factors influence the construction of meaning in discourse, offering a holistic framework for understanding communication in context.

Silverman, D. (2016). Qualitative research (4th ed.). Sage. Provides an overview of qualitative research methods, covering key concepts, techniques, and ethical considerations. It offers practical guidance on designing research projects, collecting, and analyzing data, and writing up findings, making this book an essential resource for novice and experienced researchers.

Taylor, S. J., Bogdan, R., & DeVault, M. (2015). Introduction to qualitative research methods: A guidebook and resource (4th ed.). John Wiley & Sons. Offers a comprehensive introduction to qualitative research methods, covering a wide range of approaches, techniques, and ethical considerations. It provides practical guidance on every step of the research process, from designing studies to analyzing data and writing results, making this book an invaluable resource for researchers in various fields.

Foucault, M. (1972). The archaeology of knowledge. Routledge. Presents archaeological methods for analyzing discourses and uncovering the underlying structures of knowledge

production. It explores how discourses shape the formation of concepts, categories, and systems of thought, offering insights into knowledge's historical and cultural dimensions.

Gill, R. (2018). Doing qualitative research in a digital world. Sage. Explores the intersection of qualitative research methods and digital technologies, examining how digital tools and platforms shape the research process. It discusses the opportunities and challenges of conducting qualitative research in a digital world, offering practical guidance on collecting, analyzing, and interpreting digital data.

Additional resources from the internet

Discourse Analysis
https://www.vaia.com/en-us/explanations/english/discourse/discourse-analysis/

What is Discourse Analysis? An Introduction & Guide
https://delvetool.com/blog/discourseanalysis

Discourse Analysis
https://www.sciencedirect.com/topics/social-sciences/discourse-analysis

Introducing Discourse Analysis for Qualitative Research
https://www.quirkos.com/blog/post/discourse-analysis-qualitative-research/

Discourse Analysis as Theory and Method
https://methods.sagepub.com/book/discourse-analysis-as-theory-and-method

What (Exactly) Is Discourse Analysis?
A Plain-Language Explanation & Definition (With Examples)
https://gradcoach.com/discourse-analysis-101/

Critical Discourse Analysis | Definition, Guide & Examples
https://www.scribbr.com/methodology/discourse-analysis/

Jason Underwood (2020, April 10). Critical Discourse Analysis.
https://www.youtube.com/watch?v=0TpxHCeUGHI
This video is about the techniques and skills required to analyze both literary and non-literary texts.

Grad Coach. (2023, February 9). Discourse Analysis 101: What Is It & When to Use It (With Examples). https://www.youtube.com/watch?v=EKqXWuWcJvI
This video explains what discourse analysis is and isn't, as well as exploring the different types that are available. Specifically, it explains the strengths and weaknesses of the micro-level language-in-use/linguistic approach and the macro-level socio-political approach, as well as when to use each.

Discourse analysis: Step-by-step guide with examples (MAXQDA)
https://www.maxqda.com/research-guides/discourse-analysis

More Readings on Content Analysis

Mayring, P. (2014). Qualitative content analysis: theoretical foundation, basic procedures and software solution. Klagenfurt. Provides an introduction to qualitative content analysis, covering theoretical foundations, basic procedures, and software solutions.

Stemler, S. E. (2015). Content analysis. Emerging trends in the social and behavioral sciences: An Interdisciplinary, Searchable, and Linkable Resource, 1-14. Stemler provides insights into content analysis as an emerging trend in the social and behavioral sciences, offering an interdisciplinary perspective.

Rubin, A. M., & Perse, E. M. (1987). Audience activity and television news gratifications. Communication research, 14(1), 58-84. Examines the use of content analysis as a research method in communication, with a focus on the audience's activity and the gratifications they obtain through watching television news.

Rubin, R. B., Rubin, A. M., Graham, E. E., Perse, E. M., & Seibold, D. (2010). Communication research measures II: A sourcebook. Routledge. The sourcebook presents discussions on content analysis measures and methodologies for communication research.

Krippendorff, K. (2018). Content analysis: An introduction to its methodology. Sage publications. Explains Content analysis methodology with emphasis on principles and applications.

Neuendorf, K. A. (2017). The content analysis guidebook. Sage. A guidebook for content analysis covering theory, methods, and applications.

Hase, V. (2022). Automated content analysis. In Standardisierte Inhaltsanalyse in der Kommunikationswissenschaft–Standardized Content Analysis in Communication Research: Ein Handbuch-A Handbook (pp. 23-36). Wiesbaden: Springer Fachmedien Wiesbaden. Discusses the use of automated tools and standardized methods for content analysis in communication research.

Scott, N., & Smith, A. E. (2005). Use of automated content analysis techniques for event image assessment. Tourism Recreation Research, 30(2), 87-91.

Forman, J., & Damschroder, L. (2007). Qualitative content analysis. In Empirical methods for bioethics: A primer (pp. 39-62). Emerald Group Publishing Limited.

Morgan, D. L. (1993). Qualitative content analysis: a guide to paths not taken. Qualitative health research, 3(1), 112-121.

Additional Online resources

Content Analysis Methods and Examples
https://www.publichealth.columbia.edu/research/population-health-methods/content-analysis

A hands-on guide to doing content analysis
https://www.ncbi.nlm.nih.gov/pmc/articles/PMC6234169/

The Practical Guide to Qualitative Content Analysis
https://delvetool.com/blog/guide-qualitative-content-analysis

Master Content Analysis: An All-in-One Guide
https://simplyeducate.me/2023/09/07/content-analysis/

What Is Qualitative Content Analysis?
https://gradcoach.com/qualitative-content-analysis/

Additional readings and notes for Chapter 5

More Readings on Community-Engaged Qualitative Research

Adler, P. A., & Adler, P. (Eds.). (2012). Doing Community-Based Research: Perspectives from the Field. Rutgers University Press. Offers insights into the challenges and opportunities of conducting community-based research across various disciplines. It covers topics such as building partnerships with communities, ethical considerations, and strategies for meaningful engagement.

Chevalier, J. M., & Buckles, D. J. (2013). Participatory Action Research: Theory and Methods for Engaged Inquiry. Routledge. Presents a detailed exploration of participatory action research (PAR) as a methodology for engaging communities in addressing social issues. It discusses key concepts, principles, and techniques for conducting PAR projects, emphasizing collaboration, empowerment, and social change.

Coughlin, S. S., Smith, S. A., & Fernandez, M. E. (Eds.). (2017). Handbook of Community-Based Participatory Research. Oxford University Press.
Provides a comprehensive overview of community-based participatory research, featuring contributions from leading scholars and practitioners in the field. It covers various topics, including CBPR principles, methods, evaluation, and dissemination strategies, with practical examples and case studies.

Johnson, L. R. (2007). Community-Based Qualitative Research: Approaches for Education and the Social Sciences. SAGE Publications. Offers guidance on conducting community-based research in educational and social science contexts. It covers various data collection and

analysis approaches, including interviews, focus groups, and participant observation, emphasizing ethical considerations and reflexivity.

Minkler, M., & Wallerstein, N. (Eds.). (2008). Community-Based Participatory Research for Health: Advancing Social and Health Equity. John Wiley & Sons. Provides comprehensive overviews of community-based participatory research (CBPR) principles, methods, and applications in promoting social and health equity. It offers practical guidance on engaging communities in the research process, from project planning to dissemination of findings.

Additional Online Resources

Community-Engaged Research on AI and Society Online
https://youtu.be/1SxgkrK0Lw8?si=NJritqWCB9Poo2s3

What is Community Engaged Research?
https://youtu.be/R5q19KgYCXs?si=7n4bwSXVltHrnP8b

What is Community Engagement in Research?
https://youtu.be/BIfHvKZD-DI?si=fy0CsIWrZcCGJrUH

Participatory Action Reserch and Media Literacy
https://youtu.be/WmoyDDPCwv0?si=xUFLTLhHJVqkppmH

An Introduction to Community-Based Participatory Research (CBPR)
https://youtu.be/2kcQ_C0xnBs?si=n5Y6iz2Kh8biLB10

Additional readings and notes for Chapter 6

Suggestions for Future Additions and Edits to TikTok Section

To improve and work on the guide to make it more approachable and comprehensible, the following edits for the case studies in Digital Ethnography, Qualitative Content Analysis, and Critical Discourse Analysis will help to clarify the methodologies:

1. Create summaries of the main topics, and synthesize the study steps, for example, focus on the shared features rather than the detailed list of each characteristic.
2. Create an appendix of the case studies and for the main practical guide and write a general overview of Digital Ethnography and TikTok, Content Analysis and TikTok, and Critical Discourse Analysis and TikTok. This way the practical guide will have summaries of the methodologies, and the appendix will include longer and more detailed information about the studies.
3. In Schellewald's (2021) study, the steps of the spreadsheet diary could be revisualized. Could this be a chart and the chart even a template for a field diary for other digital ethnographers to utilize?

4. Instead of or in addition to critical discourse analysis, multimodal discourse analysis could be a good way to explore what the discourse analysis of TikTok as a methodology can look like.
5. An additional literature review addressing how TikTok algorithm differs from other social media platforms and how this can be tackled and taken into consideration methodologically could be helpful.

Suggestions for Digital Media

- Restructure with more practical advice- currently this is a big listing more than advice, especially in Visual Approaches
- Decide if we need to have the eResearch framework and if it should go to a different section of the guide