Transformations in Social Science Research Methods during the COVID-19 Pandemic

Edited by J. Michael Ryan, Valerie Visanich and Gaspar Brändle

THE COVID-19 PANDEMIC SERIES

ROUTLEDGE

"What happens when one is coerced to do fieldwork out of one's living room? COVID-19 did not just foist total lockdowns, social distancing and strict measures of confinement. It also obliged a sober assessment about how we do research in the social sciences, while reshuffling research priorities, exacerbating social inequalities, and impacting on both researchers and researched in multiple and complex ways. Changes in research techniques and fieldwork were adopted and adapted within the new realities brought about by the pandemic. The increased resort to the digital has ushered in new ethical, security, validity and privacy challenges. Editors Ryan, Visanich & Brandle deploy three running themes - developing pandemic sensitivities, innovative pandemic methods and critical pandemic methodologies - to regale us with a clutch of critical reflections and practical examples of the accommodations and innovations in social science research that have been trialled during the coronavirus pandemic, and many of which are here to stay. It's a book that deserves a virtual toast."

Godfrey Baldacchino, Professor of Sociology, University of Malta, Malta

"The social transformations resulting from the pandemic have changed the way we live. This book brings together researchers who had to be creative in the face of the health crisis and who are now generous enough to share how they faced the challenges and what lessons they have learned. The book is a collection of diverse and complementary perspectives on what we learned during the pandemic and what we continue to explore after the most serious part of the global crisis has passed. Some aspects of the research have been rethought, refocused or even completely transformed. At the same time, the text engages in dialogue with the criticisms and applause generated by the transformations and does so with an open eye to all the positive things we have been able to incorporate. The resulting mosaic is stimulating, rigorous and challenging for the research community."

José A. Ruiz San Román, Professor of Sociology, Complutense University of Madrid, Spain and President of Research Committee of Sociology of Communication, International Sociological Association

TRANSFORMATIONS IN SOCIAL SCIENCE RESEARCH METHODS DURING THE COVID-19 PANDEMIC

This volume explores how researchers made innovative use of online technologies to innovate, define, and transform research methodologies in light of the varying impacts of the COVID-19 pandemic, especially those related to the ability to conduct qualitative research.

Drawing on research and case studies from around the world, this volume serves as a guidebook for those interested in attuning their own research methods to a world still struggling to grapple with the impacts of the COVID-19 pandemic.

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The COVID-19 Pandemic Series

Series Editor: J. Michael Ryan

This series examines the impact of the COVID-19 pandemic on individuals, communities, countries, and the larger global society from a social scientific perspective. It represents a timely and critical advance in knowledge related to what many believe to be the greatest threat to global ways of being in more than a century. It is imperative that academics take their rightful place alongside medical professionals as the world attempts to figure out how to deal with the current global pandemic, and how society might move forward in the future. This series represents a response to that imperative.

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1

ACCOMMODATING AND ADAPTING RESEARCH DURING THE COVID-19 PANDEMIC

J. Michael Ryan, Valerie Visanich and Gaspar Brändle

When the World Health Organization (WHO) first declared the SARS-CoV-2 virus, better known as COVID-19, to be a pandemic on March 11, 2020, few in the world were prepared for what was about to happen. Hundreds of millions of people lost their forms of gainful economic employment while hundreds of billions of dollars were made by a select few of the global elite; the increasing turn to digital technologies, at least by those lucky enough to be able to access them, increased dramatically; and long-standing gendered, racial, ethnic, class-based, and other forms of inequalities, while always (unfortunately) in the background, were thrust into the spotlight. These are just a few of the many impacts the COVID-19 pandemic has had on our world, our lives, and our potential futures.

One of the areas arguably most heavily impacted by the pandemic has been the realm of education (Ryan 2023; Ryan and Nanda 2023). Almost as soon as the pandemic was officially declared, schools and universities were suddenly shuttered, impacting 90% of the global student population, as well as the educators, researchers, and others whose livelihoods depend on such institutions (Nanda and Ryan 2023). While most (though not all) students have now started returning to educational institutions, the short- and long-term impact of such closures has yet to be fully felt or understood.

A number of studies have examined the impact of the pandemic on student learning (Bidwell et al 2021) and teacher and faculty productivity (Cohan 2021; Wright et al 2023), including differential impacts as they relate to gender (Savas and Ertan 2023), race/ethnicity (Gutiérrez et al 2023), and geography (Upor 2023), among other factors. These are indeed important issues and ones that the editors, as well as many of the contributors to this volume, have also explored. This volume aims to add to these ongoing conversations by contributing specifically to understandings of how the COVID-19 pandemic has impacted

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research methodologies. We (the editors and contributors) will attempt to do so by exploring what the pandemic has meant for the continuation, innovation, and application of research methods, especially those used in the social sciences.

Research on the move

The COVID-19 pandemic has led to profound changes in social science research methodology. Traditional methods of approaching research have undergone significant transformation, accompanied by adjustments and innovations adapted to the reality imposed by the global health crisis (Corsi and Ryan 2022). The impacts of these transformations have become increasingly evident (though often overlooked) during the course of the pandemic, but, perhaps more interestingly, some of them are having further implications and represent a potential paradigm shift in the way social science research is, and could be, conducted.

Research design and its development is a complex process, which had to be adapted at various levels and in very unexpected ways during the pandemic. Methodology, techniques, researchers and study participants themselves, as well as the context in which research was conducted, had to be revised and rethought in order to be able to continue many forms of research.

One of the most evident changes was the sudden transition from face-to-face research to online research. Faced with restrictions on movement and physical distancing, researchers were forced to adapt, often turning to the use of digital tools to conduct their studies. Undoubtedly in this context, the amount of time that many researchers and participants spend living their lives online has increased. As a result, the use of online mediated methods raises additional concerns about conducting open, reflective, and moral research in addition to challenging traditionally held notions of the "field" by releasing it from the constraints of time and location. These factors will be crucial for how we conceptualize "fieldwork" in a post-pandemic society (Kohler 2020).

Various traditional data collection techniques moved from the face-to-face space to the virtual environment, taking advantage of videoconferencing tools and online applications. These tools became invaluable means to be able to continue research for many. For example, there has been an increase in data collection through online surveys, virtual interviews, online focus groups, and other alternative online methods (see Lupton 2021). These techniques have allowed researchers to explore the experiences and perspectives of participants remotely, obtaining data quickly and efficiently in a context where physical distance and movement restrictions prevented in-person fieldwork (Will et al 2020). The adaption of online research methodologies does not itself imply that these methodologies are superior to or inferior to in-person, face-to-face research, simply they are diverse and created as a response to changing and uncertain conditions to support researchers in continuing their work through resilience. Many research projects were kept on track thanks to reflexivity, responsiveness, adaptation, and flexibility, which also emphasized the clear

benefits of adopting digital methodologies and lessons learned during the pandemic (Rahman et al 2021).

For Keen et al (2022) these changes show potential for longer-term use, beyond the pandemic's immediate practical problems. For instance, research using virtual focus groups was able to reach many underserved populations, evoked strong rapport and rich data, and brought individuals together in synchronous dialogue across many contexts. The Grid Elaboration Method, a specialized free-associative method, and other emergent interview techniques also showed further digitalized improvements, such as efficient online hiring with flexible scheduling, virtual interactions with significant rapport, and useful recording and transcription features.

At the same time as the adaptation of traditional techniques, there has also been an increase in the use of innovative and emerging research techniques, many of which have kept researchers occupied as they have worked to solve the complex problems encountered during the pandemic, a time when their expertise has arguably been most needed (Adom et al 2020). For example, many researchers have turned to social network and digital content analysis methods to understand the dissemination of information and the spread of pandemic-related misinformation (Sanford et al 2023). Of notable importance in this regard, as Sheng et al (2021) point out, was the rise of big data analysis during the pandemic, which involves exploration of large datasets collected from digital sources such as social networks, online platforms, and health records. Also, as noted by Rodríguez-Rodríguez et al (2021), social research during the pandemic has increasingly relied on artificial intelligence (AI)-based data collection methods, for example using machine learning algorithms and natural language processing techniques to analyze large volumes of data, extract patterns, identify trends, and better understand the social and psychological impacts of the pandemic. Mobile applications, wearables (such as smartwatches), and other devices have also been used as research tools to collect data and observe changes and trends related to the pandemic in real time. Finally, the availability of geospatial data provided, for instance, by location tracking, has allowed researchers to better analyze the spread of the virus and study its impact in different geographic areas and on different communities.

These new forms of research, however, have also posed challenges in terms of equitable access to technology (Ryan and Nanda 2022) and the impact this may have on the quality and representativeness of the samples. Perhaps more than even before, the digital divide and inequalities in internet access have the potential to bias results and exclude certain population groups. In addition, the COVID-19 pandemic has created further challenges in terms of establishing and maintaining trusting relationships between researchers and the individuals and groups they study. The uncertainty and fear associated with the pandemic have impacted people's willingness to participate in research and their ability to fully engage in the process (de Koning et al 2021; Strachan 2021).

Other challenges have derived from how experimentation has had to be carried out in some fields of the social sciences. For example, Peyton et al (2022) conclude that because participants' responses to treatments or the nature of online samples may have changed after the trials were completed, extrapolating from results during this extended time of crisis may be difficult. However, these authors found evidence that pre-pandemic experiments have been adequately replicated, and so argue that the pandemic does not pose a fundamental threat to the generalizability of online experiments to other time periods.

The combination of quantitative and qualitative methods, known as mixed methods or triangulation, has been widely used to address the complexity of social science research during the pandemic. The triangulation of different data sources and methodological approaches has allowed for a more complete and enriching understanding of the phenomena under investigation. In this sense, Uleanya and Yu (2023) consider that it must be considered that the impact of the pandemic on quantitative and qualitative research is potentially different, and therefore it is very important to perform an adequate triangulation of methodologies to preserve data quality.

The pandemic has also raised significant ethical challenges for social science research. Researchers have faced complex ethical dilemmas in conducting studies in a context of global crisis, where the health, privacy, and well-being of participants are of huge (even increased?) importance. This has raised debates about the safety of conducting face-to-face research and has required researchers to adapt their methods to minimize risks to participants. In short, there has been a need for ongoing ethical evaluation to ensure the protection of participants as well as researchers themselves. It has also been necessary to reflect on how this increased use of the digital raises new ethical and privacy challenges, requiring careful attention to protect participant confidentiality. In this regard, the growing popularity of videoconferencing platforms, such as Zoom, has had a significant impact on the way people participate in research (Howlett 2022), which raises several ethical implications. For example, it must be ensured that informed consent is obtained from participants, with a clear explanation of the research objectives, procedures, potential risks and benefits, and the use of the videoconferencing platform to collect data. In addition, researchers should be mindful of participant privacy and confidentiality when using these online platforms since videoconferencing is often conducted in home environments. It is crucial to put measures in place to protect the privacy of participants and prevent unauthorized disclosure of sensitive information. Researchers must also be transparent and ethical in the handling and analysis of data collected online. This involves ensuring the confidentiality and anonymity of participants, protecting the data from possible leaks or misuse, and using appropriate and ethical methods of analysis when interpreting the data.

Another important change has been the increased use of research methods based on secondary data (Rana and Gaur 2021). Researchers have relied more heavily than before the pandemic on secondary data because of the inability to

conduct their own fieldwork (Schoon 2023). The pandemic has generated an avalanche of information and data available online, from government reports and statistics to social media networks. Many of these sources, which include documents, reports, and previous studies conducted by other investigators, can be valuable in obtaining additional information and contextualizing the issues of interest. However, they can also pose certain challenges that researchers must critically address (Areco et al 2021). Some of these challenges are reliability (data and information are collected by third parties without direct control by the researcher, which may introduce distortions or limitations in the research findings), timeliness (may not reflect the most recent information and events, which may affect the accuracy of the research results), access to complete data (secondary data sources may not provide complete access to all required data), homogeneity of data (there may be a lack of diversity in the data, which may limit the generalizability of results to different settings or populations), limited availability (during the pandemic, some secondary sources may have experienced interruptions or delays in data availability), the need for validation (careful review is necessary to ensure accuracy and quality of data), and/or equitable access to data (not all secondary data are freely available to all interested researchers).

In addition to these issues, it is clear that the COVID-19 pandemic has had a significant impact on the research community, including those, such as the contributors to this volume, engaged in social science research. One of the most immediate challenges was the disruption to many (most?) forms of ongoing research. Many research projects were affected by travel restrictions, closure of academic institutions, and lack of access to participants. Researchers have faced the need to rethink their research strategies, redefine objectives, and adapt their methods to work in virtual sceneries. In addition, it has become increasingly common to face delays in data collection, modification of some research protocols, and the need to continually restructure work schedules.

Despite these obstacles, researchers have demonstrated a remarkable capacity for adaptation and resilience, taking advantage of the opportunities offered by technology and networking to continue advancing the production of knowledge during these unprecedented times. In this regard, the pandemic has spurred the creation of new support networks among academics, institutions, and organizations around the world. Social scientists have sought ways to share experiences by participating in online conferences and webinars (see, for example, The COVID-19 Pandemic Conference[1]) or attending videoconference meetings through virtual platforms. A new context that is analyzed by Karl et al (2022) who emphasized not only the important effects of such platforms but also important differences in the experiences faced by researchers working from home associated with technology: camera issues (e.g., angle, problems when turning it on or off) and microphone issues (e.g., failing to use mute), participant behavior (e.g., having to watch others eating on camera), and the unique situations resulting from the COVID-19 pandemic (e. g., watching aspects of other people's private lives).

Collaborative projects and transdisciplinary research have proliferated in response to the need to share knowledge, exchange information, compare data, and develop innovative approaches to analyze the social, economic, psychological, and other complex impacts of the pandemic. It should not be forgotten, as Barei-Guyot (2021) stresses, that these research relationships must be inclusive, particularly with partners and participants in middle- and lower-income countries, ensuring that equity is a central element of research collaborations and encouraging, for example, "decolonizing research" practices.

In addition to changes in the way research is conducted, the pandemic has influenced the thematic priorities of many social science researchers. Numerous papers and volumes have been produced as a result of the social sciences' efforts to study COVID-19-related issues (see, for example, Routledge's "The COVID-19 Pandemic Series", of which this volume is a part, available at: https://www.routledge.com/The-COVID-19-Pandemic-Series/book-series/CVIDPAN). Furthermore, the health crisis has revealed and accentuated pre-existing social and economic inequalities (Ryan and Nanda 2022), leading to increased interest in investigating issues such as gender inequality (Seedat-Khan and Zulueta 2023), poverty (Parsons 2021), political representations (Feierstein 2022), racial discrimination (Navarro and Hernandez 2022), and gaps in access to health care (Bismark et al 2022). Researchers have recognized the importance of understanding how these inequalities have been exacerbated during the pandemic and how they affect various population groups differentially. New lines of research have also emerged focusing on the psychological impact of the pandemic, such as anxiety, depression, and post-traumatic stress disorder, as well as resilience and coping strategies (e.g., Porter 2021), not just among the general population, but also among specific groups such as researchers themselves who have also had to face very complex personal and professional situations (e.g., Prior et al 2023). The pandemic has highlighted the need for urgent research and understanding of these phenomena in order to provide effective responses and solutions to the challenges we face as a society.

Finally, we are aligned with Nind et al (2023) when they suggest that the social and health impacts of the COVID-19 pandemic have been well researched, but less has been published about the process of conducting social research. This book tries to close that gap in the scientific literature by providing theoretical reflections and practical examples regarding changes, adaptations, and innovations in social science research that have been explored during the pandemic.

Accommodating the pandemic

The research process is not static or ahistorical. It is socially situated in a particular moment in time, and thus research practices reflect their time. It is not merely that the methodology is largely dependent on the research question but also that the situatedness of fieldwork in a historical moment is equally relevant in the research equation. The COVID-19 pandemic has proven to be a case study of the shifted field and its implications on research process transformations.

Although the pandemic has had an impact on all facets of social life, the interest here is on the consequences for researchers and students doing research during turbulent times, facing the imminent need to redefine the epistemological, theoretical, and ethical underpinnings of research. Total lockdowns and strict measures of confinement created an opportunity to rethink epistemological positions in respect to research methods and methodologies as well as to incorporate innovative ways of conducting research.

This volume tackles both the objects and the drivers of transformation in the research process. It is intended to stimulate reflections among researchers about their methodological transformations, failures, as well as achievements during the pandemic. It addresses how methodological best practices were mobilized to fit within the new fieldwork reality, heavily impacted by confinements and restricted physical contacts. However, it is important to note that this is not a book about limitations only – it also investigates the ways in which researchers transformed practices, recognizing research methodologies as continuous adaptive processes contextualized in time and space. The rutted journey for researchers, as they navigated their ways through health mandates of physical distancing, resulted in modifications to the traditionally required face-to-face interactions in qualitative research. Nonetheless, this journey in accommodating such changes, albeit challenging, was also innovative and groundbreaking. Although the shifts in doing social research highlighted in this book largely began toward the beginning of the pandemic in early 2020, we expect that many of these innovations, considerations, and adaptive practices will continue for some time to come.

Various chapters examine how transformations in the research processes were played out across different countries and contexts through complex and unpredictable processes whilst abiding to similar restrictions. They explore both the constants and the changes in doing research in the way research techniques and fieldwork were adopted and adapted within the new realities imposed by the pandemic.

Rather than having a deterministic view of the pandemic, we are more interested in outlining the interplay between the pandemic and research methods. In effect, this first chapter outlines the innovations adopted by researchers, including in the formulation and actualization of research. The indispensability of digital media for research is particularly accentuated in line with an examination of the various platforms, like Zoom and Google Meet, adopted to conduct fieldwork. Discussion is centered on new routes, and modifications to existing routes, for research in the social sciences. Ultimately, the aim is to introduce the reader to the major strands of research practices and discussions surrounding the research process. This provides the foundation for enabling scholars to engage with various instances and issues on doing research during challenging times. This book fills an important scholarly gap by expanding on a non-medical COVID-19 studies' intersection with research methods in social research.

Themes and chapters

The three running themes, stitching this volume together are: "Developing pandemic sensitivities", "Innovative pandemic methods", and "Critical pandemic methodologies". These themes are illustrated by theoretical and empirical contributions from various international scholars, referring to various case studies from around the world. Wide ranging areas of studies are investigated here including sport research, arts research, and linguistic approaches. The intention is to offer an open terrain for understanding the transversal adaptation modes in various fields of research within the social sciences. Some authors provide methodological maps and outline strategies to follow, however questions are raised here to critically engage in shifts in ways of doing research, and in involvement and interpretation of research.

Following this introductory chapter, the book begins with a section on *developing pandemic sensitivities*. Chapter two, "Developing social psychological theory and methods in response to the COVID-19 pandemic", develops an argument on the use of social psychological theory and methods in response to the COVID-19 pandemic. The authors, Rusi Jaspal and Glynis M. Breakwell, focus on the significant challenges, namely engagement in preventive behavior, vaccination likelihood, and mental health promotion, during the pandemic and how they were approached empirically. Additionally, this chapter focuses on the implications of the virus to doing cross-sectional survey and experimental research methods.

In chapter three "Distance discourses: The focus group through digital platforms", Miguel Ángel Sánchez-García, Isabel María Cutillas Fernández, and Marta Latorre Catalán examine the limitations and opportunities in doing focus groups online. Within the framework of a broader investigation on the impact of the pandemic on families with children at risk or in a situation of social exclusion in the Region of Murcia (Spain), this chapter allow readers to reflect on the translation of this technique to the virtual scenario and its impact on the development of the practice and the results obtained.

The use of digital research techniques was also integrated in the research design in an artistic research project by Kristina Borg. In chapter four, entitled "Batman Gżirjan: Continually revisiting the artistic qualitative research approaches", Borg outlines the trajectories of doing a socially engaged artistic research project using a multisensory, ethnographic qualitative research approach during the pandemic. The chapter discusses the maneuvers of the researcher in using different creative tools and experimental approaches employed as an adaptation to participants' needs, while still respecting the original objectives of the research project.

Chapter five, "Researching language and communication during the COVID-19 pandemic: A linguistic duo-ethnography" by Sarah Hopkyns and Melanie van den Hoven, focuses on the social phenomena of language and communication during the COVID-19 pandemic. It discusses how methodologies of linguistic

ethnography and duo-ethnography converge to create a linguistic duo-ethnography. The authors outline a dialogical approach and transnational orientations to environments and conclude on the benefits of this method for future research.

Under the second theme, *innovative pandemic methods*, chapter six, "Disruptions and innovations in sports research during the COVID-19 pandemic", focuses on the impact of the pandemic on sports research, a discipline which involves treating physical research as normative. The authors, Renzo Kerr-Cumbo, Valerie Visanich, and Matthew Muscat-Inglott discuss sport research trajectories during the pandemic and the adaptation to digital approaches in times of increased confinements and restrictions limiting substantially physical fieldwork. It examines possibilities and innovative techniques adopted during the pandemic.

This is followed by chapter seven by Najmah, Sharyn Graham Davies, Kusnan, Sari Andajani, and Tom Graham Davies entitled, "Equitable collaborations: Modelling innovative public health research during a pandemic". The authors explore innovative and (not-so) timely policy responses to COVID-19 by the Indonesian government, which needed to be informed by rapid research results. Focusing on an interdisciplinary team based in Indonesia, Australia, and New Zealand, the authors explore how they reworked established research methods in order to enable continuous research.

Chapter eight takes into consideration music-making from balconies in Spain in the discussion of possibilities and limitations to interviewing. Written by Kerman Calvo, Ester Bejarano, and Ignacio de Loyola González-Salgado, this chapter, entitled "Interviews that heal: Situated resilience and the adaptation of qualitative interviewing during lockdowns", understands the motivations of the many professional and amateur musicians who played musical instruments from their balconies and windows in a ritualistic way during the most uncertain weeks of the pandemic lockdowns.

The third theme of this volume relates to *critical pandemic methodologies*. Chapter nine by Concetta Russo provides a meta-reflection on the critical aspects of implementing qualitative research mediated by the use of ICT among a group of Italian solo self-employed workers during the COVID-19 pandemic. This chapter, entitled "Remote interviewing during a global pandemic: A methodological reflection on an ICT-mediated qualitative study implemented during COVID-19 confinement periods", focuses specifically on how ICT-mediated research techniques, including the impact of remote working on the self-employed workers who acted as respondents, as well as remote interviewing, impacted data collection and results from interpretation.

In chapter ten, "The impact of COVID-19 on postgraduate classroom-based research: An African perspective", Rose Acen Upor looks at the disruption in doing classroom-based research needed to investigate learning and teaching, and reveals adaptations done by postgraduate students. Upor outlines the need for provision of institutional guidelines for the conduct of research in terms of ethics and field-based investigation.

For chapter eleven, "Reflections on methodological reconsiderations and ethical procedures of a postdoctoral researcher", Evelyn Penfold presents a reflective autoethnographic analysis of her own postdoctoral experiences to describe the shifts in the research process. She refers to the impact on the university's ethics committee and the modification to the participant sample caused by pandemic restrictions.

This is followed by chapter twelve on the epistemological and methodological challenges and limitations, as well as the opportunities, faced in carrying out multi-sited research for the study of human mobility and return migration during the pandemic. The chapter, entitled "Troubled waters, fisherman's gain: A critical reflection on carrying out multi-sited research in times of COVID-19" by Carlos Manuel Abaunza, is based on a three-year process of transatlantic field research and includes important findings in the field of transnational return migration. It develops a critical reflection on conducting multi-sited research during the pandemic.

Note

1 Available at: https://www.youtube.com/watch?v=wa1TRBlFnsU&list=PLFJD66Lx8uV9Rj40gaWgIzDjk1OthJXTO.

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SECTION I

Developing pandemic sensitivities

2

DEVELOPING SOCIAL PSYCHOLOGICAL THEORY AND METHODS IN RESPONSE TO THE COVID-19 PANDEMIC

Rusi Jaspal and Glynis M. Breakwell

The designation of COVID-19 as a global pandemic brought about enormous social, political, economic, and psychological changes. To varying degrees and at different points during the pandemic, most countries around the world imposed the use of face coverings, physical distancing measures, and lockdowns. Travel bans were also introduced in many places. Many people became and felt isolated. Others flouted the rules. Vaccination programs were initiated. Some decided to get vaccinated while others refused to do so. Societal divisions surfaced. Conspiracy theories emerged. For most, these disease mitigation strategies reflected significant personal and social changes and had multifarious effects on identity and well-being. By mid-March 2023, confirmed numbers indicated that more than 760 million people had contracted the virus and nearly 7 million had died from it (though the actual numbers are certainly much higher, see Ryan 2023) (WHO 2023). Many were hospitalized and indeed many continue to live with the physical and psychological consequences of their COVID-19 infection (Lopes and Jaspal 2020).

In view of these significant impacts, social psychologists (and others) around the world mobilized in order to conduct empirical research into the social, political, economic, and psychological aspects of the pandemic (Ryan et al 2024, this volume). Due to the novelty of the virus and indeed the pandemic as a whole, nobody could actually claim to be previously an "expert" on how to study its effects. Most designed and conducted COVID-19 research by drawing upon the existing theories, methods, and approaches that they were using in their prior research. Many did so urgently to capture snapshots of the fast-moving pandemic – after all, every day seemed to bring with it novel developments. Researchers attempted to study the pandemic in "real time" and indeed findings did show differential outcomes at the start of the pandemic compared to the mid-point and the period following the introduction of vaccines, for

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instance (e.g., Wright et al 2021; Zimmermann et al 2021). Even the post-vaccination period was characterized by significant change, such as the emergence of concerns about the safety of the vaccines and the growth of conspiracy theories that reinforced these concerns (Jaspal et al 2022; Jaspal and Breakwell 2023a). Yet, amidst this continuous change, the research generated by social psychologists and indeed other social scientists – imperfect as it may have been – provided valuable insights into the potential short-, medium-, and long-term consequences of the pandemic, as well as the underpinnings of behavior change which was, and continues to be, desperately needed to manage them.

This chapter explores some key methodological aspects of social psychological research into aspects of the COVID-19 pandemic. Specifically, we reflect upon our own empirical research into the social psychological aspects of the pandemic, focusing upon its consequences, such as the increased mental health burden, as well as the antecedents of engagement in preventive behavior, such as adherence to physical distancing and the wearing of face coverings and vaccination likelihood. First, some of the novel areas that we were able to address in our social psychological research are discussed. Second, some methodological approaches to data generation and data analysis in our work are considered. Third, broader issues concerning the way in which social science research is commissioned in anticipation for and during a pandemic are examined. It is shown that, although the pandemic presented challenges for researchers, it also provided opportunities for creativity in the application of existing research methods and, indeed, in the development of theory which could have lasting utility for the social psychological analysis of future pandemics and other health crises. It is important to note that this creativity did not necessarily consist of the development of new methods but rather in the use of existing approaches in unconventional and more integrated ways. The pandemic sensitized us not only to the limitations of some existing methodological approaches but also to the real-world consequences of these limitations in a context in which quick answers to important questions were needed.

Methodological opportunities and challenges

Acknowledging that the pandemic represented both opportunities and challenges for researchers to develop not only methods but also theory, this section focuses upon some illustrations of the research opportunities taken and challenges addressed during the pandemic. We start with an illustration of how an existing theory was used to predict COVID-19 reactions and how this allowed the theory to be tested empirically.

Opportunities: The case of Identity Process Theory

During the course of the pandemic, many research questions and hypotheses were generated and tested by researchers working in distinct areas of the social sciences. This led to a wide range of findings, often focusing on relatively

"niche" areas, and from particular theoretical and methodological perspectives and often reflecting researchers' own previous research foci. To some extent, this resulted in a fragmentation of knowledge concerning the impact of COVID-19 with limited evidence of integration and synthesis (Breakwell et al 2023; Wright et al 2022). However, the various different approaches to COVID-19 research did provide valuable insights into particular issues and, in some cases, by seeking to test empirically the predictive power of specific theories, facilitated theoretical development which could also enhance our understanding of future crises.

Psychologists have long focused on the significance of identity processes in relation to cognition, affect, and behavior. In doing so, we have mainly used Identity Process Theory (e.g., Barnett and Vasileiou 2014; Breakwell 2014; Jaspal and Breakwell 2014). Identity Process Theory focuses on the construction, development, and protection of identity in the face of change (Breakwell 2015). A key theoretical assumption is that a person's sense of identity will motivate them to think, feel, and behave in particular ways. Therefore, when the outbreak of COVID-19 occurred, it seemed sensible to apply tenets of Identity Process Theory to the study of the pandemic in order to develop and propose evidence-based and theoretically driven strategies for enhancing well-being and for preventing adverse health outcomes.

The pandemic acted as an arena in which important constructs from Identity Process Theory could be tested and also where they could be used to indicate ways to improve public responses to the pandemic. Identity resilience is one of these constructs. It is determined by the extent to which the individual's identity possesses four characteristics: self-esteem, self-efficacy, positive distinctiveness, and continuity (Breakwell 2021; Breakwell et al 2022a). Identity resilience is a central part of Identity Process Theory's description of how individuals cope with threat and uncertainty (Breakwell 2021, 2023). Levels of this characteristic influence perceptions of identity threat (which is harmful for psychological well-being) upon exposure to a hazard (e.g., the pandemic and the risks associated with it) as well as the quality of individuals' strategies for coping (e.g., the decision to vaccinate or not). In our research, we have found identity resilience to be directly associated with lower fear of COVID-19 (Breakwell and Jaspal 2021) and indirectly associated with greater vaccination likelihood (Breakwell et al 2023). This research suggests that policy strategies for achieving public compliance with guidance for reducing disease incidence should attend to the role of identity resilience in individuals, groups, and, indeed, whole societies.

In another study, we used the concept of ingroup power, which in Identity Process Theory refers to "the level of political, economic and cultural influence or control an individual attributes to the category to which they are assigned by society or in which they claim membership" (Breakwell et al 2022b, 1303). We used this concept in order to understand the reported differences in engagement in preventive and vaccination behaviors among people from minority ethnic backgrounds in the United Kingdom, reasoning that perceived inequalities on

the basis of one's (ethnic) group membership may lead people to reject institutional guidance on COVID-19 mitigation. Ingroup power tends not be examined in models of health behavior. Yet, our studies showed it to be a significant determinant of health behavior. Breakwell et al (2023) found that ingroup power was indirectly associated (through trust in science and scientists) with people's likelihood of engaging in COVID-19 preventive behavior, such as face mask wearing and adherence to physical distancing rules. The more that people felt their ingroup had political, economic, and cultural influence, the more likely they were to adhere to preventive measures. We have found this to be the case in relation to vaccination likelihood (Jaspal and Breakwell 2023b) and our empirical research in this area continues.

It is notable that such use of existing theoretical constructs to account for what was happening in the pandemic did not require significant innovations in methods of data collection. It did, however, require heightened sensitivity to the way in which those methods could be deployed and the data collected could be analyzed. For instance, the data collection may have entailed the very well-established use of self-report questionnaire-based surveys, administered online (Sánchez-García et al 2024, this volume). However, the pandemic specifically challenged such a study design to identify the sample parameters meticulously and to ensure, where appropriate, that socio-demographic differences could be assessed (including cross-national differences). The pandemic also highlighted the importance of reliability and validity of construct measures (because policy cannot afford to be based on evidence that is inadequate). This emphasis on the sensitive and cautious use of existing methods extends across the full spectrum of methods that may be used (whether qualitative or quantitative). It seems that one of the effects of the pandemic in relation to the development of methods revolves around prioritizing the need for rigor in the utilization of the method – irrespective of what method it is. It can be argued that the COVID-19 pandemic did not initiate fundamental change in most methods used in social science research, but that it accelerated the speed with which changes that were already underway were further tested and adopted more generally. The most notable examples of this lie in changes in the channels used to collect information. For instance, increasingly, researchers used online communication with participants in research in order to collect data directly but they also used other digital sources (e.g., social media content or video recordings of public behaviors) to collect data indirectly. These changes had already started but the constraints during the pandemic increased their acceptance and encouraged novel and imaginative uses of such ways to collect data.

Challenges

In this section, we describe two illustrations of the challenges faced by researchers in producing valid and useful data during the pandemic. The first concerns measurement methods. The second involves sampling methods.

1 The case of equivalence cross-nationally and cross-culturally in measurement methods

In spite of the important theoretical and empirical developments generated by individual studies, there was a clear challenge associated with the synthesis of research findings from the many studies conducted. This was especially important in relation to data on behavioral likelihood, intention, or action during the pandemic. This problem was partly associated with the varied ways in which behavioral and other constructs were measured across the many international research programs underway, but also the ways in which response options in survey questions were interpreted by participants in studies.

Drawing upon survey data from two studies conducted during the pandemic, Wright et al (2022) set out to examine the response alternatives presented in surveys, noting that they can both constrain responses and convey information about the assumed expectations of the survey designers. The focus of their study was on the choice of response alternatives for the types of behavioral frequency questions used in many COVID-19 and other health surveys. First, they examined issues with vague quantifiers, such as "rarely" and "frequently". Using data from 30 countries from the Imperial COVID Data Hub (Imperial College London 2023), they demonstrated that the interpretation of these vague quantifiers (and indeed their translations into other languages) were contingent upon the social norms in each country. It was noted that, if the mean amount of hand washing in a country was high, it was likely that "frequently" denoted a higher numeric value for hand washing than if the mean in the country was low. Second, they examined sets of numeric alternatives using data from a US survey, in which respondents were randomly allocated to receive either response alternatives where most of the scale corresponded to low frequencies or where most of the scale corresponded to high frequencies. The authors found that those given the low frequency set provided lower estimates of the health behaviors than those provided with the high frequency set. Overall, the study showed that the choice of response alternatives for behavioral frequency questions can affect estimates of health behaviors and that the ways in which the response alternatives mold the responses should be taken into account, particularly for epidemiological modelling. More generally, the study showed that the construction of rating scales needs to accommodate the impact of societal norms on individual responses. Importantly for the development of research methods, the study suggested that, when analyzing differences in responses between samples drawn from populations characterized by dissimilar social norms, researchers should seek to identify these response bias effects.

2 The case of sampling methods

A challenge that emerged during the pandemic for researchers was the need to examine how ethnic minority groups, in particular, responded to the situation. This empirical concern arose from the observation, soon after the outbreak,

that individuals from some ethnic minority groups were disproportionately affected by COVID-19 and that they exhibited poorer health and well-being outcomes (Jaspal and Breakwell 2023b). However, there is some evidence that the research community internationally did not respond effectively to the challenge of identifying factors that might account for these ethnic differences. As part of our project funded by the British Academy and the Science and Innovation Network in the USA in early 2022 (Jaspal et al 2022), we conducted a mapping review of literature focusing on the role of ethnicity in psychological influences upon COVID-19 preventive behaviors and vaccination likelihood or vaccine hesitancy (Breakwell et al 2023). In the period reviewed, we found relatively few published outputs originating in the United States or the United Kingdom that explicitly examined ethnic differences in the predictors of COVID-19 preventive behavior or vaccination likelihood or hesitancy, even though there were many epidemiological studies that showed both higher incidence of COVID-19 in ethnic minority groups as well as ethnic differences in actual behavior relating to the pandemic. Indeed, we found that only one (Khanijahani et al 2021) of 1391 systematic review articles published during the period of our search focused on ethnicity effects upon COVID-19 protection or prevention activity.

Some of the studies could not adequately examine ethnicity effects due to the composition of the samples involved. The studies reviewed typically focused on samples with about 30% or less ethnic minority individuals and this often included three or more different ethnic minority categories. Limitations in the sample structure led to other challenges in analyzing the data collected. Given the typical sample sizes used in studies during the pandemic, making comparisons among minority categories would most likely lead to low statistical power. To circumvent this problem, in some studies, all non-White respondents were placed into a single category when making statistical comparisons. This obscured heterogeneity across the minority categories which showed the inadequacy of the approach. Some studies (e.g., Breakwell et al 2022b) have indeed found differences between various non-White ethnic groupings in regard to determinants of COVID-19 preventive behaviors. It can be concluded on the basis of these findings that, if the purpose is to examine differences among ethnic categories, quota sampling should be used. In the large majority of studies that were reviewed, this was not the case.

It should be noted that some of the studies that did include ethnicity in analyses were also fraught with problems. Ethnicity, often as a single dummy variable, was placed in multiple regressions without apparent justification other than that it existed as a variable in the data set. This has problematic consequences in the regression for interpreting the resulting coefficient estimates because inappropriate covariates bias the estimates of coefficients. This does not mean that ethnicity and related variables should not be included in multiple regressions, but it does indicate that the effects they have should be acknowledged.

The sampling challenges (and associated data analysis problems) involved in studying ethnicity effects on reactions during the pandemic are presented here as

one illustration of a more general methodological challenge that emerges in public crises. By their nature such crises make it hard to identify in advance which samples will be the most important to study and to be assured that access to them and co-operation from them will be forthcoming. COVID-19 has stimulated the research community to acknowledge the need for sampling methods to improve, but despite improvements in data collection techniques, especially facilitated by AI and data analytics, there is still some way to go in developing sampling methods.

Methods of data generation and analysis

Much social psychological research during COVID-19 focused upon what people thought and felt about the pandemic and its associated mitigation strategies as well as what they said they would do or were doing. In order to generate data concerning these issues, social psychologists conducted surveys and, to a lesser extent, experiments. In this section, we consider two case studies of research we have conducted using cross-sectional survey and experimental designs in the context of the COVID-19 pandemic. The first highlights some common limitations of the methods of data generation and analysis used, specifically in relation to sampling and with regard to establishing causal relationships between variables. The second suggests one way of addressing some of these limitations through combining survey and experimental approaches.

Case study 1: A survey of discrimination and mental health outcomes in Black British and South Asian people in the United Kingdom

Soon after the initial outbreak of COVID-19 in the United Kingdom, it became clear that some ethnic minority groups exhibited higher SARS-CoV-2 virus-related morbidity and mortality rates than the general population. There was also some emerging evidence of the greater mental health burden faced by individuals from some minority ethnic groups (Nguyen et al 2022). Some commentators attributed these health inequalities to the long-standing discrimination and marginalization faced by ethnic minority people. In view of the known mental health burden associated with COVID-19, Jaspal and Lopes (2021) conducted a study of discrimination and mental health outcomes in two significant ethnic minority groups in the United Kingdom, namely Black British and British South Asian people. They measured ethnic identification, religiosity, British national identification, perceived discrimination, fear of COVID-19, generalized anxiety, depression, and life satisfaction.

In view of previous research showing significant differences in levels of experienced discrimination and national and ethnic identification (Jaspal et al 2021), the authors reasoned that discrimination, fear of COVID-19, ethnic group membership, and life satisfaction should predict the variance of generalized anxiety, with British South Asians being more susceptible to anxiety, and

discrimination and fear of COVID-19 being positively related to anxiety. Finally, in light of the literature highlighting ethnic group differences (British South Asians vs. British Black) in type of discrimination experienced and strength of British national identification, they predicted that the relationships between ethnic groups and the mental health variables of depression and generalized anxiety should be mediated by the social identity variables (religiosity, strength of ethnic and British national identification, and different types of discrimination, specifically religious and ethnic discrimination), fear of COVID-19, and life satisfaction. Using structural equation modelling, they were able to show that all the hypotheses were supported by the data.

While valuable, the survey data generated suffered from limitations – some inherent to the design of the study itself whose implications should be considered in the specific context of the pandemic. First, the study sampled only a limited number of ethnic groups. (echoing the sampling limitations described earlier in other studies). Second, although the cross-sectional design provided preliminary evidence concerning risk of poor mental health in the two groups studied, it was impossible to ascertain causality on the basis of the cross-sectional data. In order to do so, one would need to test the same hypotheses using an experimental design, which in turn might shed light on the causal effect of discriminatory experiences on fear of COVID-19 and the mental health variables. For instance, the findings suggested that fear of COVID-19 predicted anxiety, depression, and life satisfaction but it could plausibly be argued that people with higher levels of anxiety and depression and lower overall life satisfaction are more susceptible to becoming fearful of COVID-19. In short, structural equation modelling of cross-sectional data can enable us to speculate about causal relationships, partly on the basis of previous literature supporting our hypotheses, but it does not allow for unequivocal conclusions in this regard.

Case study 2: Experimental research into COVID-19 preventive behavior and vaccination likelihood using the Self-Determined Framing Approach

In seeking to improve our chances of establishing causal relationships, we used a design for our second case study that embedded an experimental manipulation within a survey. Although this is not a totally novel method of data collection, the type of manipulation used did constitute an elaboration of earlier techniques.

In order to examine the effects of uncertainty upon an individual's COVID-19 preventive behavior and vaccination likelihood, we used an experimental approach that involved asking individuals to describe in writing their own uncertainties about the disease. We did not seek to arouse uncertainty by presenting any specific stimulus (e.g., information). Participants had complete freedom to identify (and frame) their own uncertainties. We provided them with the opportunity to crystalize their own uncertainties. We labelled this the Self-Determined Framing Approach. A control group was not invited to report their uncertainties.

The Self-Determined Framing Approach builds upon good practice from several areas of social science research and particularly from psychological research (including cognitive, developmental, and social psychology). Our approach presents an open invitation for participants to think about the issues that matter to them (i.e., those that are of personal significance) and thus allows respondents greater control over determining the nature of the intervention. It has both qualitative and quantitative aspects and involves an experimental component. In our research, we have been strong advocates of the use of mixed method research designs (e.g., Breakwell et al 2020; Jaspal 2020). In the case of this study, the framing task produced for us a wealth of qualitative data on the nature of uncertainties participants were experiencing. It also represented an effective experimental manipulation. We found that participants in the experimental condition differed significantly from the control condition in their responses to subsequent questions about their behavioral intentions regarding COVID-19.

During the COVID-19 lockdowns, the Self-Determined Framing Approach was particularly useful as part of online survey and experimental data collection. It simultaneously performs the manipulation and also generates a corpus of qualitative data facilitating a detailed understanding of participants' experience. More importantly, the approach allows people to describe the things that they subjectively perceive to be sources of uncertainty, rather than the researcher making assumptions about the stimuli that will induce uncertainty. In such studies, the experimental manipulation is preceded by baseline measures and followed by measures of the outcome variables of interest. Flexibility is inherent to the Self-Determined Framing Approach. Notably, the approach allows several variants of interventions to be used in a single survey. This increases the flexibility of the questions that can be examined. It also improves the robustness of tests of causal relationships between variables. Flexibility is also derived from having the open-ended texts generated by the intervention. These data can be subjected to qualitative or quantitative textual analysis. This is important because it allows researchers to engage in methodological triangulation, that is, by using the qualitative findings to add further depth to the quantitative relationships that are observed.

Research integrating experimental designs in cross-sectional surveys can provide fruitful insights. Such integration has the power to enhance the potential impact of both experimental and survey designs on policy and practice.

Research methods and design in context

It is important to assess the potential value of any research method or design in the broader environmental (including social and policy) context in which it is to be used. The way in which research is designed and the methods employed depend on the questions that are addressed but also on the context in which the research occurs (Breakwell 2023b; Breakwell et al 2020). So far in this chapter

we have focused on how individual researchers or research teams responded to the opportunities and challenges of the COVID-19 pandemic. In this section we turn to a broader consideration of how research systems can become more effective in anticipation of and responses during public crises.

The COVID-19 global pandemic presented an unusual context for social science research. The concatenation of a multiplicity of demands from the diverse potential "users" and "sponsors" of the research made it extraordinary. What was needed varied – the ways in which people would think, feel, and behave, what was called for, encompassed information, explanations, predictions, and, above all, models for intervening and bringing about change. The research community was asked to provide answers and to work at speed and to be flexible and responsive to changing circumstances. The disease ignored cultural and national borders and thus researchers had to initiate data collection designs that were cross-cultural and cross-national.

Many different levels of analysis (from the intra-psychic to the societal, Breakwell 2014) had to be used to understand responses to the spread of the disease and to the policies marshalled to quell it. This emphasized the need for multidisciplinary teamwork. In addition, many discrete aspects of the response to the pandemic had to be examined simultaneously. For example, the effects of social (and physical) isolation and the determinants of vaccine hesitancy; the response to conspiracy theories and the compliance with test and trace methods; the viability of working from home and the impact of school closures; and the global trade and economic implications of lockdowns all had to be analyzed conterminously – though not by the same researchers.

All of this was done under political and public scrutiny and great media attention internationally. In the United Kingdom at least, the need for social sciences insight in developing management strategies for the pandemic was recognized (see Jaspal et al 2022). However, the social science response to the call for help was not coordinated. Despite various reviews of how science (including behavioral science) might serve policy in the context of health crises (e.g., Royal Society and The Academy of Medical Sciences 2006), there was no integrated and tested plan for the use of the social sciences that had been prepared in advance for the possibility of such a rapid-onset, global pandemic. Consequently, the machinery was not in place to provide "social science to go", like fast food, that could be delivered on time and to order in a way that governments around the world needed. Instead, many researchers responded to the crisis rapidly but, as noted above, were mostly driven by their own prior theoretical and methodological preconceptions. An enormous range of social science studies targeted COVID-19 phenomena but they were designed separately and, unsurprisingly given the novelty of the issues examined, the methods (e.g., definition and measurement of constructs) used were often unproven (e.g., with regard to validity or reliability). At national and international levels, integration and interpretation of the plethora of data generated was difficult (especially given the diversity and variable adequacy of sampling and statistical

approaches) and, inevitably, could not be linked to any unifying theoretical model. It may not be necessary to agree upon such a unifying model but the absence of one tends to result in inconsistency in research-based advice to policy makers. This is problematic especially given that health interventions based upon research that is firmly grounded in theory tend to be more effective in the long term.

Even without prior planning for an international, integrated social science research response to a pandemic such as COVID-19, there were some notable, very large-scale, multi-national, cross-sectional, time-sequential studies (e.g., Imperial College London 2023 Covid Data Hub) and some single nation, longitudinal studies (e.g., Centre for Longitudinal Studies 2023) commissioned quickly at the start of the pandemic that did provide substantial, relevant information to policy makers and to the public. It is notable that these studies tended to use methods for data collection and analysis that were already well-established.

The COVID-19 pandemic has raised many questions about how social science methods can and should change. Besides offering opportunities to refine new methods of data collection, it laid down challenges for researchers. For instance, it highlighted the need for cross-cultural and cross-national studies and the value of cohort-sequential longitudinal research. It required researchers to be clearly accountable for designing studies that would be useful in problem solving. It emphasized that researchers needed to communicate their findings to many diverse publics. It showed that public understanding of social science was important and that researchers might benefit from employing methods that use collaboration with multiple partners and diverse users.

The COVID-19 pandemic also posed new challenges for the organizations, nationally and internationally, that commission social science research in the context of public crises. There are four developments that we argue would improve the value of social science methods in such crises:

1. The establishment of an ongoing record of lessons learned regarding the use and misuse of social science methodological approaches during crises.
2. Creating formal training programs for social science researchers in their role in such crises.
3. The formation of an international social science rapid response unit that could be deployed at the start of a crisis to provide initial assessment of the research needs and subsequently to support the choice of methods for the teams commissioned to conduct long-term studies.
4. The convening of an ongoing international "think tank", with rotating membership, on social science methodological approaches to crisis analysis and management, linked to other bodies (such as the WHO).

This might also allow social science input to policy making prior to a crisis. Overall, it would certainly improve the range of methods available to social scientists during a crisis. Most importantly, it would mean that the process for the systematic commissioning of coordinated packages of multidisciplinary

research internationally in major crises could be improved. It could also encourage greater collaboration between social scientists and those in other branches of science. Solutions to major problems require such synergies between methodological approaches from different disciplines (Corsi and Ryan 2022). Context will continue to shape the methods that are developed and those that are used, but preparatory planning on a grand scale has the potential to reduce the likelihood of wasted effort and avoidable error. In anticipation of future health crises, it would thus be advantageous to test with rigor how the research effort should be mobilized. This will involve laying down preparatory guidelines for marshalling research resources cost-effectively. This should involve scenario planning approaches to the anticipatory design of research activities that would be required under different crisis conditions. We would conclude that it is time for component parts of the international research system to look to evolve their own structures and processes to become able to support effective methodological developments ready for the next health crisis.

Conclusions

Health crises, including pandemics, are complex. They precipitate many social, political, economic, and psychological changes. Many of these changes interact to produce any particular set of outcomes. Our research methods must be fit for purpose in this complex context. In our research, we found that the measurement of vague quantifiers and numerical alternatives in behavioral questions and the treatment of ethnicity in COVID-19 research was inadequate. These types of inadequacies severely undermined the impact that the research could have. We cannot realistically hope to understand important outcomes if we do not use research methods innovatively. We must continue to refine our existing methods. We must combine these methods. We must create new methods. Methodological orthodoxy – attractive as it is to some researchers – will result in only limited snapshots of the issue under investigation.

In this chapter, we have focused on two approaches to quantitative data: cross-sectional surveys and experiments. However, qualitative data are also vitally important in understanding psychological phenomena (Borg 2024, this volume; Jaspal 2020; Russo 2024, this volume). Psychology in the United Kingdom, for instance, has long been characterized by a methodological divide between those who use qualitative methods and those who use quantitative methods. Further divisions are apparent among those quantitative researchers who see themselves as experimentalists and those who use survey methods. Similarly, some qualitative researchers see no merit in researching anything beyond the discourse of individuals. Others uncritically accept the status of discourse as a window into cognition, affect, and behavior. It must also be acknowledged that some disciplines are more or less associated with particular research methods. In the United Kingdom at least, sociological studies tend to be dominated by qualitative interview methods and psychological studies by

experimental methods. Both clearly have merit and a significant scientific contribution to make. By relying upon only one, however, we limit the extent, significance, and impact of our findings. By combining them, we generate scope for the triangulation of our findings. Individually, none of these approaches will ever provide us with the full picture. They must be seen as individual components of a toolbox for social scientists.

The pandemic actually provided much opportunity for theoretical and methodological synthesis. In this chapter, we have described how tenets of Identity Process Theory were used to predict behavior change and, in particular, vaccination likelihood, thereby providing a deeper and richer understanding of some of the intra-psychic, interpersonal, and intergroup factors that prompt people to endorse a key COVID-19 preventive behavior. We focused upon identity resilience and ingroup power. The insights that these constructs provide will be invaluable for policy makers hoping to bring about behavior change in the general population. The information deficit model may suggest that we just need to inform people if we want them to comply with behavioral guidelines (see Jaspal et al 2014). Our research shows that the total identity of the individual, as well as their perceptions of the influence their ingroups possess, are a key determinant of the decisions that they will take. Furthermore, in our research, we have described the contributions and limitations of cross-sectional survey methods as well as a novel experimental approach that we developed in order to understand some of the causal factors in determining people's reactions to the pandemic. We have indicated how the generation of different types of data enabled us to piece together key empirical observations thereby facilitating more holistic understandings of the pandemic and people's reactions to it. To this end, we also note the significance of methodological triangulation not only within the same study (as is the case using the Self-Determined Framing Approach that generates both qualitative and quantitative data) but also across studies.

In this chapter, we have also described some of the environmental factors that made COVID-19 research so challenging to conduct and to synthesize. Some other issues include: the pace of change in the pandemic and the relatively slow dissemination of research findings; the challenges in conducting cross-sequential and longitudinal research, thereby impeding analysis of the progression of the pandemic; the (in)consistency of responses to questions regarding current and future engagement in self- and other-protective behaviors; the limited insight into paralinguistics and non-verbal communication in online individual and group interviews; and the advent of creative methodologies to study the COVID-19 reaction in "real time" (Borg 2024, this volume; Hopkyns and van den Hoven 2024, this volume). We have provided some practical recommendations (based upon "lessons learned") that can enable us to address these challenges in research into future crises.

Social science researchers must not only use their existing tools to address the big issues but they must also capitalize on the methodological and theoretical opportunities that societal crises offer us. Crises force us to rethink our

approaches and to take calculated risks to make the best of what we have available to us. We need to focus in our research not only upon the limitations but also the successes. We need to use what we have learned – our successes and failures – to inform our future approaches. We need to navigate with confidence the environmental challenges that can inhibit the research we hope to conduct. This does not always involve the creation of brand-new methods. Indeed, there is little evidence that this happened during the pandemic. Rather, the pandemic allowed us to use our methods differently and to be unconventional in their use. This was encouraged given the fast-moving nature of the pandemic and the need for quick answers to pressing questions. We believe that this enriched the social sciences and that it has provided us with more creative methodological approaches that will aid us as we confront future crises. This chapter has intended to stimulate reflection among researchers about their methodological achievements and indeed future, as well as how methodological best practice can be mobilized in response to future crises, whatever they may be.

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3

DISTANCE DISCOURSES

The focus group through digital platforms

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The COVID-19 pandemic has accelerated the incorporation of digital applications into social science research. In the case of qualitative methodologies, the use of tools such as Zoom, Google Meet, and Microsoft Teams have made it possible to adapt qualitative techniques to confined settings, enabling remote conversation between researchers and subjects of study. As has been the case in all areas of social life, social research has not escaped the challenges and changes imposed by the confinements and restrictions on mobility and concentration of people, as well as the reduction of research funding.

Indeed, qualitative research has been particularly conditioned and restricted in this context. Given that this type of research requires the physical presence of the researcher in the field, who, as Taylor and Bogdan (1987) put it, has to "go to the people" to collect empirical information first-hand through words and behaviors (Sabia and Figueredo 2022), measures of social distancing have forced qualitative researchers to adapt to a new scenario. Enrique Martín Criado (2014) pointed out that "immersion in the field" (leaving the usual circle of social relations, interacting with different people, participating in their scenarios) protects the researcher against the "prenotations that inevitably accompany it" (93). With the pandemic, therefore, the challenge was to achieve "immersion in the field" without leaving home.

However, the COVID-19 crisis has also generated new opportunities for the social sciences, such as the possibility to participate in online conferences around the world or to analyze the impacts that the pandemic has had on citizens, institutions, and even on the practice of social research itself (Molinari and De Villiers 2021). Consequently, and as this chapter demonstrates, like all crises, the COVID-19 pandemic has also become an object of research, allowing for a rethinking epistemological positions in respect to research methods and methodologies (Ryan et al 2024, this volume). Indeed, as Najmah et al (2024)

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show in this volume, qualitative research was also able to contribute to improving government responses to the COVID-19 pandemic.

This chapter aims to contribute to the literature that examines the limits and potentialities that the COVID-19 pandemic has generated for qualitative research. Specifically, we aim to analyze the way in which focus group practice has moved to an online setting, and how this has affected the development and results obtained through this technique.

The research we took as a reference was carried out between March and June 2021 and its main objective was to analyze the impact of COVID-19 on families with minors in the Region of Murcia (Spain) at risk or in a situation of social exclusion.[1] The methodological strategy combined quantitative and qualitative methods. On the one hand, a survey was designed for families with children in the Region of Murcia at risk of social exclusion, which was completed online. According to the characteristics of the survey, the most appropriate procedure for collecting information would have been by means of surveys in the family home once the households had been randomly selected. However, the pandemic situation prevented the implementation of this procedure. To try to overcome these difficulties, an adaptation strategy was designed that included several steps.

Firstly, the directors of the selected schools were contacted by mail and telephone to request their collaboration. This collaboration consisted of presenting the study and distributing the survey link. A total of 84 educational centers were contacted, of which 69 centers agreed to distribute the survey among households. In addition, four schools located in particularly vulnerable areas were selected. An interviewer-mediator collaborated in the completion of the survey in these centers. Likewise, contact was made with various Federations of Parents' Associations, requesting their collaboration in the distribution of the survey in different areas of the Region of Murcia. The collaboration of NGOs was also requested in order to disseminate the surveys and carry out support and advisory tasks. A total of 667 surveys were collected, of which 638 households remained in the sample once the process of filtering them for various reasons (repetitions, non-response, etc.) had been carried out.

The qualitative approach was organized around two research techniques: the focus group and the in-depth interview. Although both the interview and the focus groups are two qualitative techniques that require co-presence and their execution has therefore been conditioned and limited by health restrictions, for this work we took only the focus group as the object of study and theoretical reflection. In total, four focus groups were carried out. The first was made up of technical staff from NGOs that develop intervention projects in the socio-educational field; the second was made up of school directors; the third was made up of school teachers; and the fourth was carried out with representatives of Parents' Associations.

According to Alonso (2003), we could define the focus group as "a socialised conversation project in which the production of a group communication

situation serves to capture and analyze the ideological discourses and symbolic representations associated with any social phenomenon" (93). In this sense, the fundamental objective of the focus group is to learn about the social representations, that is, the systems of norms and values, as well as the images associated with institutions, collectives, or themes that social groups have and which emerge from the discursive confrontation between their members. Thus, in the controlled and guided group conversation of the focus group, through communicative and linguistic processes, the subjects display their social perceptions as subjective representatives of objective positions (Alonso 2003).

From the above, we can deduce the importance of social and group interaction among the participants at the time of the group. As Martín Criado (1997) explains, the participants, with their statements and those of others, as well as through all the metacommunicative clues – gestures, tone of voice, body position, etc. – negotiate a definition of the situation and of the legitimate schemes of interpretation. This intersubjective and collective construction of meaning differs to a large extent from what happens in an interview. In an interview, the interviewee's discourse is negotiated only, and implicitly, with an interviewer, who can exercise a certain kind of structural censorship over what he or she says and how he or she says it. However, when answering questions, the interviewee does not have to contrast and confront his or her discourse with members of his or her own social, professional, ethnic, etc. group.

Participants' interactions during the focus group where a socially constructed naturalness is recreated (Schütz 1993) make explicit the ideas circulating tacitly within the group under study. This means that its translation to an online scenario has greater repercussions, as we said, than in the case of the in-depth interview, which is why the article focuses exclusively on our experience with the online focus group. Thus, the first section is devoted to the limits that the online focus group has for the intersubjective construction of discourse. In a second section we point out some nuances and differences observed according to the profile of the participants, the time of the pandemic. or the type of application used. The chapter closes with a section of conclusions.

Limits to the intersubjective construction of discourse at a distance

Martín Criado (1997) points out in his work on the focus group technique that "every discursive product is the result of the relationship between two systems of relations: the interpretative schemes of the participants and the social situation in which they find themselves" (104). The author draws on Blom and Gumperz's (1986) reading of Goffman's (1963) work to identify the three elements that regulate any social interaction: place, situation, and event. These three elements define the type and number of participants who can intervene in an interaction; the topics that can be talked about; a margin for changing the subject; the type of verbal and non-verbal actions allowed (body movements, position, tone of voice); and a margin for divergence of opinions (Martín

Criado 1997, 84). Therefore, when organizing a focus group, these three elements must be considered. Indeed, the place where the meeting takes place; the way in which the situation is defined, that is, the pattern of behavior within the interaction (formality-informality of the meeting, role of the moderator, communication among participants); and the event, which refers to the limited set of topics marked by routines of opening and closing by the moderator, are crucial aspects in this type of technique.

Alonso (2003) suggests that the focus group is designed so that the discussion does not revolve around the individual, particular, and private memories of the participants, but rather on their social and shared memory, which is activated in the conversational process. For this reason, he points out that the appropriate number of participants is between five people – which allows for a socialized group situation, thus avoiding the intimate situation of three people or two couples in cross-conversation – and nine or ten participants. Within this range, the group members tend to perceive that they are part of a collective discussion where they are addressing an audience, and at the same time it is a controllable number that prevents the conversation from breaking up and dispersing into subgroups, giving rise to overlapping interventions (102). The organizers and moderators of the focus group therefore aim to create a framework, a spatial and temporal context, in which communicative interaction is possible, i.e., a dialogical situation where the participant does not do so as a private individual but as a transactional and relational individual (Bruner 1990, 81–95).

Although at the time of convening the focus groups the situation of confinement had ended in Spain, health measures of social distancing meant that the groups had to be conducted through the Zoom application. The first element that was altered when conducting the groups online is what we could call the *social setting*. From a neutral and spacious meeting room with all participants sharing a common physical space, built, as if it were a stage, for the occasion, we moved on to the different private and professional spaces from which the group members connected.

The members of the first group, made up of NGO employees working on socio-educational intervention projects, mostly participated from their workstations, not in isolated rooms but at desks in a shared space with other colleagues or even with their own bosses. School and high school principals, on the other hand, did participate in all cases from a private and isolated space, either in their individual offices or in an empty meeting room. On the other hand, participants in the group of primary and secondary school teachers, as well as parents of pupils linked to school associations, did so preferably from home, in some cases when there was no one at home and in others with family members present, to whom they had to attend to. This diversity of spaces and companies had an important impact on the development of the groups and on the discourses collected.

Thus, one of the main limitations of conducting online groups has to do precisely with the difficulty of maintaining the definition of the situation. In

focus groups, as Martín Criado (1997, 96–97) points out, a certain balance must be achieved between exceptionality and involvement. The group should function as a relatively exceptional situation that prevents participants from reducing their discourse to a series of clichés and stereotypes common in everyday conversation among peers. On the contrary, the focus group should facilitate making explicit what is usually implicit in an everyday interaction between acquaintances. In order to generate this exceptionality that goes beyond the knowledge background (Garfinkel 2006), it is important to control some elements. For example, it is important that the participants, although they may share objective positions in the social space, do not know each other beforehand. Other aspects, such as the presence of the tape recorder at the table, also help to define the situation as atypical, so that it is clear that the aim of the meeting is to collect a discourse for research. What is involved, therefore, unlike what happens in an informal chat with friends – where values such as wit, fun, or a comfortable retreat to the dominant discourse of one of the group members can circulate – is to collectively construct a "truth" about the topics discussed.

However, this exceptionality, while important, should not be excessive, since too much attention to external details may prevent participants' involvement in the conversation (Martín Criado 1997, 98). In other words, we must be able to create a space that is formal enough to encourage engagement and interest, but in which participants feel comfortable to express their opinions, even if these deviate from the general consensus of the group.

What we observed when conducting the Zoom groups is that the exceptionality of the online conversation was such that in many cases it prevented a "natural", even honest, intervention by the participants. In the case of those who took part from the workspaces, there were multiple interruptions during the meeting that broke the attempts to build a framework for dialogue: excessive background noise, phone calls, quick questions or queries from other colleagues to the participants, etc. The same was true for those who took part from home, especially if they were women, who at many points in the meeting, which lasted two hours on average, were obliged to be absent for care reasons, as other research has shown (Romero 2021). In this sense, as Sabia and Figueredo (2022) point out, based on Goffman (1997), there are basically two actions to avoid problems of defining the situation in an interaction: corrective practices and preventive practices. The former anticipate the existence of a problem of definition, while the latter remedy cases of discredit that could not be avoided. In our case, there were cases of preventive practices such as making it obvious from the outset that it was a "busy day at the office" or that "the children were at home". There were also corrective practices, such as when a colleague of a participant joined the focus group and had to be asked to leave the meeting.

This exceptionality increased or decreased depending on the participants' familiarity with the tool. In the case of NGO employees and younger teachers, who were already accustomed to Zoom and the use of technological tools, mastery of the application contributed to the naturalness of their interventions,

but not so in the case of parents of pupils and even head teachers, who often had to be reminded how to intervene, how to ask for a turn to speak, or how to turn off the microphone if there was background noise in the room. All these elements provoked an interaction which, in most groups and at most moments, favored extensive individual interventions, with a game more typical of motivated questions/answers directed not at an audience but at the moderator, who ended up acquiring a more invasive role in the group conversation. This is a dynamic that did not favor the dialogic process in which the group members elaborate, negotiate, and confront each other, and are guided and controlled by a moderator who takes on a more passive, less directive role, leaving the framework of interpretation to be generated by the group (Alonso 2003).

In order to reduce this effect in our fieldwork, we endeavored to avoid what Bourdieu (2007) called, albeit in his case in relation to the in-depth interview, "the logic of the double game in the reciprocal confirmation of identities" (535).[2] That is to say, the interviewee, in this case a member of the group, responds diligently to the questions posed by the moderator; while the moderator, for his or her part, satisfied to receive an elaborated and constructed discourse that fits his or her *preconceptions* or hypotheses, allows the interviewee to take control of the conversation, forgetting the very meaning of a focus group.

On the other hand, and in general, there was a scarce and intermittent linking of participants with each other during the meetings, which is explained both by the scarce interpellation and by the absence of metacommunicative elements typical of face-to-face interaction such as gestures, closeness, or glances through which the cognitive and discursive interweaving that contributes to the collective construction of the discourse is achieved (Jaspal and Breakwell 2024, this volume). As Cáceres et al (2017) point out, when communication takes place face-to-face, where the subjects are accessible to each other in the interaction, it is impossible to ignore the presence of others because it is within the cognitive field. This fact favors the degree of involvement of the individual in a situation of co-presence over a computer-mediated communication, where the individual can cut the connection, stop responding, lose his or her attention, measure his or her involvement, and control, in short, the progress of the interaction (238).

However, it could be seen that in the cases of the participants who were more familiar with the use of Zoom and who intervened from a private space without interruptions, the conversation reached moments of more dialogue, of greater discursive cooperation. This facilitated, for example, the contrast of opinions and dissent, and helped to confront and bring to the surface legitimate and illegitimate representations of issues within a group.

In short, the interplay with the various elements that make up the focus group situation – meeting space, degree of exceptionality of the situation, role of the moderator – are particularly altered when conducting the focus group online. The ability and challenge for researchers is to generate an interaction that allows for dialogue, confrontation, or balanced participation without interruptions or censorship due to the presence of co-workers/partners/bosses.

In the following section we will delve into the factors that can facilitate and hinder the intersubjective construction of discourse in online focus groups.

Nuances, inequalities, and dilemmas of online focus groups

As Cáceres (2017) describe, the widespread presence of technology in everyday life makes the internet a space for meeting and sociability that no longer needs co-presence. The pandemic, for its part, has had a major impact on this process, accelerating and amplifying it even further (Manzanera and Brändle 2022). A survey by the Centro de Investigaciones Sociológicas during the COVID-19 crisis revealed that during the confinement 23% of Spaniards bought a computer or other computer equipment and more than half, 53.4%, declared that they had increased their time on the internet during this period (CIS 2021).

However, as Sabia and Figueredo (2022) point out, although ICT tools are widespread and used on a daily basis, this is not uniformly the case. For example, in the case of Spain, almost half of the population does not have basic digital skills and only one third has basic skills above this level (European Commission 2021). During the confinement, this digital divide became more evident and visible, especially affecting people over 65 years old – despite their efforts to adapt to digital tools during the pandemic – (Manzanera and Brändle 2022) and the population with fewer educational, economic and technological resources (Losa et al 2021). Thus, among households with the lowest incomes (900 euros net monthly or less), almost 9% of households with children do not have access to the internet. Moreover, the lack of access to a computer is almost 20 times higher in the poorest households, especially affecting single-parent households (Manzanera and Brändle 2022, 4; Gobierno de España 2020; INE 2021).

Parallel to inequality in access to and use of technological applications, the COVID-19 crisis also revealed other dynamics that were not so visible until then. For example, the psychosocial damage resulting from longer working hours and the blurring of the boundaries between work, leisure, and care time, especially in the case of working-age women (Romero 2021; Manzano 2018).

During our research, these situations created several limitations for the implementation of the online focus groups. On the one hand, when it came to drawing up the sample, older people, especially in the case of teachers and head teachers, and parents of students with fewer resources, did not participate in the research because they did not master the Zoom application, did not have a personal computer, or because of work-life balance problems. Even this inequality also had an impact during the focus groups, as people with greater knowledge and control of digital tools tended to participate more and for longer. However, if these limitations affected the configuration and development of our fieldwork, they would have done so to a much greater extent if our target population occupied more subordinate positions in the labor market and social structure, such as migrants in an irregular situation, precarious workers, seasonal agricultural workers without a stable residence, etc.

At the time the focus groups were designed, Spain was in the second year of the pandemic – a phase in which both teleworking and the use of digital applications were fully installed and, therefore, the perception of exhaustion and tiredness of workers in relation to permanent videoconferencing was significant (Manzanera and Brändle 2022). According to recent work (DeFilippis et al 2020), the confinements led to a significant increase in the number of emails exchanged and meetings held. The most striking increases were in the number of meetings (up 12.9%) and the number of attendees (up 13.5%).

Thus, while these "teleworkers", who are generally in the middle age of working life, have a high level of education and full access to digital technologies, were more willing to participate in the research, they tended to perceive the focus groups as "just another Zoom work meeting". A definition that in a sense reduced their involvement in the conversation and the exceptional nature of the conversation compared to other online interactions in the workspace or at home. In this scenario, it is essential that during the phase of contacting the participants, the particularities of this meeting and what is expected of those who connect to it should be insisted on with much greater vehemence than if it were a face-to-face focus group, even if this means an added difficulty in complying with the planned sample. In the digital environment, the moderator's tools to solve the shortcomings of the contact phase are substantially reduced.

Therefore, it is important to note that the limitations of conducting online focus groups are not only limited to the time of the conversation, but also to the selection of people who can participate in this type of remote research, either because they lack skills and resources or, especially during the pandemic, because of digital saturation or exhaustion.

On the other hand, at the ethical level, the use of digital tools and applications also poses some dilemmas. As Abad (2016) points out, qualitative research, beyond legal compliance with certain standardized protocols, always requires a situated and pragmatic ethics, which "demands a permanent critical and creative attitude to resolve situations of moral conflict as they arise in the research process" (115).

During the focus groups there were some moments when "reactive ethical strategies", as Neale (2013, 8) calls them, which involve making decisions in the face of dilemmas or unforeseen events, had to be applied. For example, during the focus group with school and high school teachers, one of the participants, who had confirmed that she would take part from her workplace, finally connected to the call from her private car while driving home. Faced with this setback, the participant introduced what we previously defined with Goffman as *preventive practice*, explaining that she had to return home due to an unforeseen event and that it was a long journey without much traffic. At first, given that the participant did not inform the research group beforehand, we had to make a decision at that moment and, despite the fact that she was an essential profile for the sample, that ruled out her participation in an attempt to be ethically responsible in view of the multiple risks that this circumstance generated.

On the other hand, for the research group, it was essential for the participants to have the camera and microphone turned on during the interventions in order to encourage bonding between them. This requirement, in addition to discouraging some profiles – mostly women with dependents at home – was also difficult to maintain during the group. For example, when participants were called upon by a co-worker or another member of the household, forcing them to turn off the camera and microphone and leave the conversation for a short time. Despite these interruptions, we decided to continue with the focus groups, noting when the participant's absence occurred and for how long, without applying corrective or reactive practices.

Moreover, the obligation to keep the camera on implies that the participants in the group could at all times pay attention to their image and physical appearance, which undoubtedly hinders the involvement and concentration of the participants in the meeting. In other words, it is not only that there may be reluctance for video recording, which was already a common practice in face-to-face focus groups, but that the participant, constantly exposed to the image he/she projects, is as much, if not more, attentive to it as to his/her words. This video dysmorphia (Brändle and Manzanera 2022, 2), we consider, detracts from the naturalness and spontaneity of the interventions.

As has been pointed out, the online focus group generates symbolic and ethical ruptures in the definition of the situation to a greater extent than the face-to-face group, which hinders the dialogical and intersubjective construction of the discourse. In addition to the difficulties in controlling the definition of the situation, there are other dilemmas that appear at a later stage: during the analysis of the discourses. As we have noted above, in many cases the participants intervened from spaces shared with co-workers, bosses, or members of the household. The ethical and methodological dilemma caused by this contingency when interpreting the discourses revolves around how the presence of the *close other* – not socially, but in terms of work, family, or friendship – can lead to structural censorship that denaturalizes the discourse and brings it closer to stereotyped and frayed statements, without elaboration or explicitness.

For example, in the group made up of NGO employees working on socio-educational intervention projects, we noticed that the connection from the workplace, surrounded by colleagues and even bosses, prevented several of the participants from detaching themselves from their role as representatives of their organization. Thus, it was difficult as moderators, on the one hand, to prevent the interventions from being limited to a list of the projects and actions developed by their NGO and, on the other hand, to encourage a common debate on the needs, covered and not covered, of families with children at risk of or in a situation of social exclusion, as this could reveal the shortcomings not detected or covered by the organizations. The solution we tried to find to this problem was to always keep in mind the behind-the-scenes of the research process (Wainerman and Sautu 2001) and to point out in which cases interventions could be conditioned by this fact, adding this circumstance to the reasoning and interpretative analysis.

Finally, one of the requirements of the focus group is, as Alonso (2003) points out, that the participants do not know each other beforehand, in order to favor the exceptionality of the situation, the cooperative construction of meaning, and to avoid stereotyped discourses. As is the case with the appearance of unforeseen events and interruptions that crack the definition of the situation, this condition is also difficult to fulfil in the case of the focus group at a distance, given that the participants may be exposed to the judgement of a person from the same circle. This condition is undoubtedly aggravated when the other person listening to your message occupies a position of greater hierarchy or control. In these cases, we believe that the ethical and methodological response of researchers should be pragmatic, reflexive, and adapted to each context and research situation.

Conclusions

With the return to "normality", the possibility of returning to face-to-face fieldwork in social research has also returned. Interviews, focus groups, or discussion groups have returned to face-to-face interviews and in physical spaces that meet the appropriate conditions for this purpose. However, the use of technology and virtual environments has not been totally abandoned. The facilities offered by the development of online research techniques (lower costs, time saving, simplified logistics, increased success rate in the contact phase, among others) have made this method another resource for the researcher.

In this new scenario of coexistence between the online and the face-to-face, we consider it interesting to make some reflections, based on the experience presented in this chapter, that attempt to contribute to the debate on the potential shortcomings when carrying out qualitative research through digital applications. According to Kerr-Cumbo et al (2024, this volume), it's important to avoid hasty studies of dubious long-term scope outside the immediate context forced by the pandemic, and to aspire to promote a methodological legacy and lasting improvements in the scope and quality of research: a legacy that will have to pose a different epistemological and ethical framework (Calvo et al 2024, this volume).

Firstly, the specific characteristics, and the final objective, of each of the qualitative research techniques generate different obstacles for their virtual development. In this sense, we consider that the importance of interaction in the construction of a group discourse conditions the translation of the focus group to an online scenario to a greater extent than that of other techniques such as the interview. An interaction in which not only the words (what is said), but also gestures, silences, interruptions, space, or the ease of leaving the group condition the involvement of the participants with the technique, the moderator's ability to conduct the situation, and, of course, the final discourse obtained. In this way, we understand that the virtual environment obliges the researcher, to a greater extent than the face-to-face one, on the one hand, to a

continuous critical vigilance of the design of the fieldwork and, on the other, to anticipate responses to possible setbacks that may arise. The following is a brief review, which is neither exhaustive nor complete, of the limitations we have encountered during our work.

On the one hand, it seems clear that the relevance of online fieldwork will be greatly conditioned by the profile of the population under study. This is not only because of the possibility of constructing a more fluid and uninterrupted space for interaction, but also to avoid exposing our informants to the symbolic violence that requires knowledge of certain tools or the availability of material goods such as a computer or a good internet connection. Thus, the focus group conducted with school principals, who were familiar with the use of these applications and computer media, allowed for greater discursive construction than the focus group conducted with representatives of Parents' Associations, in which the participants presented very unequal resources.

In the same sense, the research carried out has shown that sharing space with other people (work colleagues, partners, or family members) while the group is being conducted conditions, and in some cases even censors, the discourse of the participants. We consider that this limitation of the technique must be considered especially when the research carried out deals with subjects that may be sensitive or compromise the informant. However, this conditioning of the discourse by the presence of people close to the interviewee/participant can also occur when the fieldwork is carried out in person, for example, when the informant comes to the interview or focus group accompanied by another person who will participate or listen to the conversation. However, we believe that this limitation can be better controlled and is less common in a face-to-face context than in a virtual one.

Research in virtual settings brings us closer to informants, who can participate in our research with very little impact to their routine and obligations; however, it is just as easy to leave the group or to participate without real involvement (by combining it with other activities, for example). This, moreover, is intensified in a scenario such as the current one in which most of us are saturated with participating in meetings, courses, and activities virtually. At the touch of a button, the informant can leave the group without being subjected to the scrutiny or judgement of the other participants and the moderator. Therefore, as noted above, the characteristics of the research technique and what is expected of the participant must be emphasized during contact. In this attempt to ensure the participant's involvement, it would be appropriate to return to the classic debate on the relevance or otherwise of remunerating participation in the group, traditionally with a gift or gift voucher. This consideration for attendance, which, as Martín Criado (1997, 99) points out, "is closer to a commercial relationship than a gift", can give formality and commitment to the situation.

Related to the previous point, the importance of the figure of the moderator in the development of the focus groups became visible in the fieldwork presented. The making of important decisions during the sessions (such as not

incorporating informants who did not meet certain requirements, even if this went against the sample; or silencing members of the group, to avoid noise), or the need to develop a more active and directive role than desired to achieve group interaction, recommend that the moderator has sufficient knowledge of both the focus group technique and the population under study. As Bourdieu (2007) points out, "the sociologist can help them (the informants) in this work (discourse construction) in the manner of a midwife, provided that he possesses a thorough knowledge of the conditions of existence that produce them and of the social effects that the survey relationship (the research technique) can exert, and through it, their position and their primary dispositions" (539). Social research shows itself more clearly as a craft to be learned by doing.

In short, to use a cliché, technology is here to stay in qualitative research as well. The restrictions established in response to the COVID-19 health emergency favored and accelerated the incorporation of digital applications in qualitative fieldwork, a process in which quantitative research had already been immersed for years (for example, with telematic surveys). However, the ultimate aim of qualitative research, which is none other than to capture the discourses, intentions, expectations, and interpretations that subjects make in regards to a phenomenon or situation, complicates its translation to the virtual. To the extent that we are not looking for numerical data, but rather to construct and reconstruct collective imaginaries, the face-to-face interaction is more vital than in other methodologies and, especially, in research techniques such as the focus group. In this sense, it is the researcher's task to try to anticipate and control the limitations of the online space, making the most of its advantages.

Notes

1 Losa, Antonio (Ed.) 2021. "Evaluation of the impact of COVID-19 on families with children in the Region of Murcia". Murcia: EAPN-RM. https://eapnmurcia.org/pandemia/.

2 As Bourdieu (2007) points out, the interview implies a certain type of social relationship that also generates effects on the results obtained. Although the interviewer has no intention of exercising any kind of symbolic violence capable of affecting the answers, the truth is that it is not possible to rely exclusively on the goodwill of the interviewer, because in the very nature of the relationship between interviewer and interviewee are inscribed all kinds of relational distortions, such as, for example, those that have to do with the social asymmetries derived from the social positions occupied by one and the other (2007, 528). It would certainly be interesting to analyze how the social relationship between interviewer and interviewee is affected by the online interview compared to the face-to-face, in-depth interview: would symbolic violence and structural censorship increase or be more controlled, would responses be more or less distorted? Answering these kinds of questions, we think, would be very interesting, although the contrasts to observe these differences would be more complex than in the case of the explicit negotiation and confrontation that the focus group allows.

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4

BATMAN GŻIRJAN

Continually revisiting the artistic qualitative research approaches

Kristina Borg

Batman Gżirjan: Continually revisiting the artistic qualitative research approaches

Socially engaged and community art practices place an important focus on the process as projects unfold, while collaborating with diverse community groups. Such processes, which often look beyond the end result or final outcome of a project – be it an exhibition, a theatre piece, a product, a performance – also tend to have a research objective that employs qualitative methodologies, usually led by an artist-researcher. Artistic qualitative research approaches have the potential to think, notice new elements, experiment, create new networks, provide alternative interpretations, be innovative and "imagine new horizons within which to act" (Duncombe and Lambert 2021, 51).

Batman Gżirjan,[1] commissioned by the University of Malta and which I developed as the leading artist-researcher, is one example of such socially engaged artistic-research projects. This project collaborated with a group of locals and fishers in Gżira – a busy and changing seaside town in the eastern region of the small island state of Malta in the Mediterranean Sea. The aims of its research process were to explore and analyze the effects of over-construction and private development on the daily life of inhabitants, and these were attained through a series of workshops that focused on collective memory and the transformation of the place, conducted through a multisensory ethnographic research approach. The research process led to public sharing through a co-created community performance piece in Gżira's public space (Borg 2021). This included an interactive promenade performance on land whereby the audience experienced a number of linking pop-up acts, performed by the participating community members who breathed life into a narrative that resulted from the qualitative research. The performance and narrative concluded with a boat ride

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at sea where the latter obtained the role of the protagonist and was further activated by a group of synchronized swimmers.

The objective of this chapter focuses on the qualitative research process and, more specifically, how this shifted when impacted by the COVID-19 pandemic. The chapter will discuss the different creative tools and innovative, experimental approaches employed in adapting to the participants' needs, while making sure not to compromise the original objectives of the research project. Additionally, the discussion will also highlight the need for a continual revisiting of the research methods and the challenges that this entailed.

The context of Batman Gżirjan

Research within a wider project

Batman Gżirjan developed as part of the wider European arts-based action research project Acting on the Margins: Arts as Social Sculpture (AMASS), funded by the European Union's Horizon 2020 research and innovation programme. AMASS took place between 2020 and 2023 and involved eight countries situated "on the margins" of Europe, namely six universities from Malta, Czech Republic, Hungary, England, Sweden, and Finland, and two civil society organizations from Portugal and Italy. Through multidisciplinary and participatory means, AMASS aimed "to create concrete opportunities for people to come together and accompany artists as agents in creative projects and interpretations … capturing, assessing and harnessing the societal impact of the arts and further generate social impact through policy recommendations" (AMASS, n.d.). To investigate this across the eight countries, AMASS implemented 35 artistic practical experiments, *Batman Gżirjan* being one of them. Each artistic experiment collaborated with a local NGO that also acted as the project's gatekeeper. In the case of *Batman Gżirjan*, the research team worked with *Flimkien għal Ambjent Aħjar*[2] (FAA) as well as with the local community pressure group *Inħobbu l-Gżira*.[3]

The location of Gżira and its transformation

Gżira is a seaside town in the eastern region of Malta, as part of the Marsamxett Harbour. The term "Gżira" means "island" in Maltese, and the town is precisely named after neighboring Manoel Island, which is located in the middle of the harbor forming part of Gżira's territory, as illustrated in Figure 4.1. Originally, as Borg (2021) explains, Gżira developed as a small working-class suburb of adjacent Sliema, and as one of the participant community members described it, "Gżira is the ugly sister of Sliema". "However, recent regeneration of the town turned it into a business community of hotels, restaurants, online gaming companies, real estate and financial institutions and offices" (Borg 2021, 222).

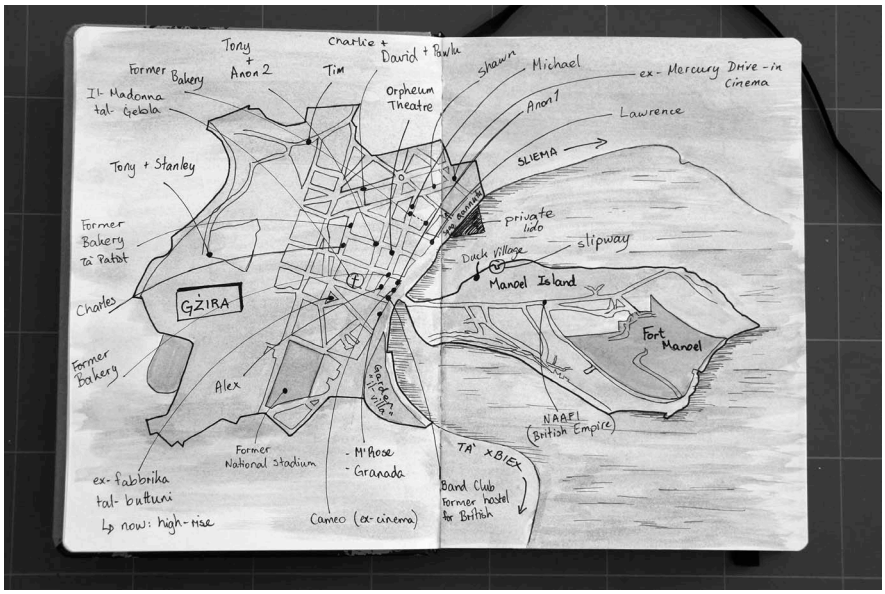

FIGURE 4.1 A double-page from the author's visual journal. Photo by the author.

Gżira lacks a public square that usually acts as a community hub; instead, the town's seafront serves this purpose, together with the views of Fort Manoel, on Manoel Island, and Valletta—Malta's capital city—as a backdrop behind it. As Borg (2021) points out, this view, together with the accessibility to the foreshore, are severely threatened by the planned private redevelopment of Manoel Island, and by the construction of a private lido managed by a group of hotels, and other private interventions, namely those offering catering services, all appropriating the town's seafront area. Moreover, further privatisation of the yacht marina is also impacting a good part of the seafront public garden—the only green space in town. These private ventures "have gained power[4] and are abusing it to the extent of marginalising the powerless" (Borg 2021, 223).[5]

The participating community groups

The artistic-research project *Batman Gżirjan* involved two working groups – a group of locals and a group of fishers. The first group of the locals included ten community members – seven males and three females – who all resided in Gżira, except for three who had moved out of their hometown but were still passionate about it. This working group presented a rich diversity of (1) age – ranging from 30 to 76 years old, and (2) educational background – from no or basic qualifications to tertiary level. The second group included five male fishers who all still lived in town, except for one. In this case, all fishers were of senior age and retired, with the eldest one in his 80s (Borg 2021).

All 15 participants were recruited through an open call that the partnering NGO FAA shared on its Facebook and Instagram pages, as well as through a press release that was published in printed and online press. Two radio morning programs also supported this recruitment process. And lastly, it is important to acknowledge that word of mouth was also a good means of recruitment, especially in the case of the second working group – the fishers (Borg 2021). All participants took part in a series of workshops as outlined in further detail in the next pages.

In times of a global pandemic

Before the discussion delves deeper, it is crucial to point out that the groundwork was laid in the early months of 2020, prior to the impact of the COVID-19 global pandemic when no one could yet foresee the long-term duration of the pandemic and the challenges it offered. At those initial stages, the original plans were to launch the open call around December 2020 and to eventually start collaborating with the two community working groups in January 2021 when the series of research workshops was planned to kick off. Needless to say, the pandemic imposed a number of delays on the project: just as the world slowed down, the launch of the open call was postponed to March 2021. Although Malta was already a year into the pandemic, the situation was still stressful and rather chaotic, especially in terms of community organization meetings – be they events, concerts, exhibitions, workshops, parties, and more. To complicate matters further, this coincided with a surge in COVID-19 positive cases and, consequently, with the second partial lockdown (Borg 2021).

The lack of stability in this complex situation indeed presented the project with the first main challenge, amongst others, that required a number of adaptations; and important decisions, at times difficult, had to be made.

Pre-COVID-19 research plans: What changed and what remained

Changing the format and nature of the research workshops

The first important change and decision that had to be made was in March 2021, that is, whether to delay the research workshops once more and hold them after the partial lockdown, or to adapt and change their format and, thus, switch to digital means. On the one hand, some people were hesitant to follow in-person workshops and requested a virtual option. On the other hand, not all community members had the same means of access to the digital realm, and, moreover – and of more concern – not everyone had the same level of digital literacy skills, especially when taking into consideration the wide range of the overall age group, from the 30s to the 80s (Borg 2021; Sánchez García et al 2024, this volume). Not knowing how long the second partial lockdown would

last, the research team decided to take the challenge to shift towards a digital methodology, when and where possible.

The working group of the ten locals were more willing to engage through digital means. Nevertheless, this provided its own complexity. Two of the elderly participants had never used the Zoom online videoconferencing software, so a few days prior to the first workshop, as the project's leading artist-researcher, I guided them separately over a phone call to download and install it on their desktop computers, running also a test Zoom call. The original plan for the sessions with this group of ten locals was to hold five in-person research workshops at Gżira's band club premises, followed by another five in-person development sessions at the same premises, and which the group of the fishers would have also joined. The digital shift dictated some adaptations, namely a reduction in the number of sessions. The research workshops, now held online, were kept to five sessions, but the development sessions together with the fishers – held in-person after the partial lockdown was lifted in April 2021 – were reduced from five to three. This meant that the locals followed a total of eight sessions, held once every two weeks (Borg 2021).

One other challenge that Borg (2021) identified was digital fatigue. One of the elderly participants in the locals' working group was not willing to take part in a two-hour workshop sitting down at the computer, but was very keen to meet in person for a chat. Hence, once the partial lockdown was lifted, the initial five digital research workshops were repeated and adapted into a series of three one-to-one, in-person sessions with this specific participant, held at Gżira's seafront public garden.

In the case of the fishers' working group, the situation was quite different. The challenge was indeed a lack of access to technological devices, and, consequently, a gap in digital literacy. This meant that there was no other option but to postpone their respective set of workshops until after the second partial lockdown was lifted (Borg 2021). Originally, the plan was to hold four in-person research sessions, followed by another five in-person development sessions during which they would have merged with the group of the locals. Hence, a total of nine sessions. However, due to the postponement, the number of the first set of sessions was reduced from four to three in-person sessions, always held at the band club premises, and eventually from five to three when the fishers merged with the locals' group, thus, the fishers followed a total of six in-person sessions, held once every two weeks.

Once the partial lockdown was lifted and the two working groups of the locals and the fishers could continue with the development process in person and together as one group of 15 participants, challenges did not cease. Three of the locals were not available to join in-person sessions due to personal reasons, including vulnerable health issues. Hence, while the majority of the participants followed three in-person development sessions at Gżira's band club premises, these sessions were also offered and repeated online the following day to cater for the needs of the aforementioned three participants (Borg 2021). Needless to

say, this was very time-consuming, but, on the other hand, the latter group provided the opportunity of acting as a testbed audience who provided feedback and suggestions on the content and work created by the main group during the in-person development sessions.

All the research and development workshop sessions reached a conclusion by the beginning of July 2021. A processing phase followed, once again in collaboration with the participating community members, leading up to a co-created community performance that was shared with the public in September 2021, in Gżira's public space (Borg 2021).

Maintaining the research concepts and objectives

Despite all the aforementioned changes and adaptations, it was constantly made sure that these did not compromise the original objectives of the artistic-research project. As an artist-researcher with a formation originating in the visual arts, all my research concepts start off with a visual analogy, and the everyday person Batman, who uses his superhero powers to combat the greed and corruption of Gotham City, provided the starting point for the project in question. This was maintained as baseline throughout all the research process, and during the first online workshop with the locals, the group – artist-researcher and participating community members alike – asked,

> Has the abuse of power made Gżira a Gotham city? Does Gżira need everyday persons to achieve superhero powers to combat this? … Can Batman be a collective being? How can this collective being with superhero power be made present in the public space?
>
> *(Borg 2021, 224)*

This visual proposition immediately set off an artistic activism attitude amongst all participating community members, and as Sholette (2022) discusses, "Sometimes this activist engagement is carried out subtly, although more frequently, and especially recently, it employs a degree of militancy that makes artistic practice appear barely distinguishable from activism per se" (12–13). Drawing on theorist Kuba Szreder, Sholette (2022) considers artistic activism as a means of "repurposing social energies, reputations, ideas, and resources, gleaned from the global circulation of art, for the sake of [broader political] struggles" (151). And indeed, the ultimate aim of the artistic-research project *Batman Gżirjan* was to restore power to the powerless inhabitants of Gżira, "whose rights, needs, desires and well-being have been disregarded" (Borg 2021, 224) by those who in one way or another gained power.

Duncombe and Lambert (2021) present art and activism as a complementary combination. Whereas activism aims to generate an "effect" through a concrete action, art is a form of expression that generates "affect", working mostly on emotion. On these terms, an affective experience can lead to concrete actions,

thus, "affect produces effect" (Duncombe and Lambert 2021, 29), and similarly, tangible effects can also have an affective and emotional impact, thus, "effect produces affect" (Duncombe and Lambert 2021, 29). Bringing both concepts together, Duncombe and Lambert (2021) suggest a new term, "æffect" as the goal of artistic activism – "emotionally resonant experiences that lead to measurable shifts in power" (Duncombe and Lambert 2018). To maximize this æffective impact, *Batman Gżirjan* always aimed to contextualize itself in and relate to Gżira's public space, where the political landscape and the cultural landscape merge together, providing a new terrain to work with/in (Duncombe and Lambert 2018). The project adopted this framework both throughout the research process, albeit the changes and adaptations, and in the public sharing through the co-created community performance piece. Working with/for communities runs the risk of being patronising and intimidating, where the artists and/or the activists are perceived by the communities as the experts. Artistic activism reverses this relationship, where people are believed to possess valuable knowledge, and in the context of local culture they are the local knowledge holders, thus, they are the real experts (Duncombe and Lambert 2018; Helguera 2011).

Acknowledging that the participating community members were the real local experts, understanding the social and cultural context, the local dynamics and the interpersonal scenarios was key to building a relationship based on mutual trust, which eventually led to a better understanding of the participants' needs and interests, evolving into a more fruitful exchange process (Helguera 2011). Conversation and dialogue played a pivotal role as they allowed "people to engage with others, create community, learn together, or simply share experiences" (Helguera 2011, 40). However, the legitimate question that emerged from the digital shift asked: How can the online exchange guarantee proper engagement and sharing, whereby each participant still feels part of a community? The original objective of shaping the research workshops on the basis of conversation and exchange, facilitated by a series of hands-on tasks, was maintained but this presented further challenges, as outlined in the next section. At this stage it was imperative that, as the leading artist-researcher, I maintained the role of the artist as "a model of the anthropologist engaged" (Kosuth 2008, 182). Whereas both art and anthropology aim to build a relationship with society, art manifests itself through *praxis*, and "its growth as a cultural reality is necessitated by a dialectical relationship with the activity's historicity (cultural memory) and the social fabric of present-day reality" (Kosuth 2008, 183).

This constant attempt of connecting the present to its past, while also devising its future is described by Lippard as "the lure of the local" where nature, culture, history, and politics intertwine – "the pull of place that operates on each of us, exposing our politics and our spiritual legacies. It is the geographical component of the psychological need to belong somewhere, one antidote to a prevailing alienation" (Lippard 1997, 7). *Batman Gżirjan* precisely aimed to understand the inhabitants' relation with their locality, specifically what they referred to as their hometown that offered a sense of place, even for those

participants who for various reasons moved out to other localities, as well as for those who were not originally born in Gżira but moved there later in life.

> Most often place applies to our own "local" – entwined with personal memory, known or unknown histories, marks made in the land that provoke and evoke. Place … is temporal and spatial, personal and political … place has width as well as depth. It is about connections, what surround it, what formed it, what happened there, what will happen there.
>
> *(Lippard 1997, 7)*

The project analyzed this sense of place by starting off from the individual memory of the participants, moving on to the collective memory by identifying common stories and significant episodes that comprise Gżira's historical identity. This aligns with philosopher Ágnes Heller's definition of "the everyday", "the co-constitution of self and society. It is the aggregate of both the attitudes that shape the self and the processes of shaping the world" (Papastergiadis 2008, 69).

On a deeper level, the artistic-research project also examined why and when this sense of place diminishes or changes. To draw on Lippard's (1997) thinking, when and why does "the lure of the local" stop being the "antidote to a prevailing alienation"? In other words, why does alienation become ever more prevalent in our places? As Papastergiadis (2008) argues, "Not only are more and more people living in places which are remote and unfamiliar to them, but even those who have not moved increasingly feel estranged from their own sense of place" (72). Indeed, the participating community members, both the locals and the fishers, spoke about the town's changing identity. The original small working-class community has been replaced by a greater group of expats, who whilst utilizing Gżira for their everyday needs – residential, working, entertainment – don't all feel the sense of place, and consequently feel no sense of belonging. To a certain extent, for most of the expats, Gżira serves a temporary purpose, with a constant flow of people moving in and out. Hence, the locality's identity is quite transient (Borg 2021).

Moreover, *Batman Gżirjan* attempted to move beyond the effect and look into the cause. The project also analyzed why Gżira is experiencing this change, perceived by the community members as a negative one, mainly due to the loss of the sense of place and belonging. One of the research objectives was to map the transformation of Gżira on a physical and infrastructural level, by looking at its past and present, as well as at the inhabitants' vision for its future. Our surroundings affect us, and our personalities are,

> … determined by the places we happen to be in, by the colour of the bricks, the height of the ceilings and the layout of the streets. …We look to our buildings to hold us, like a kind of psychological mould.
>
> *(De Botton 2006, 106–107)*

Linking to these architectural elements, the participating community members expressed how typical two-storey houses were being replaced by blocks of apartments, offices, and hotels, including also one high-rise in the core part of the town. Some of the impacts included several simultaneous road closures due to construction cranes and machinery blocking access, traffic jams all day long, and noise and visual pollution, linking also to a lack of architectural aesthetics. Some of the participants also expressed that they no longer had access to the sunlight due to the newly constructed neighboring buildings.

The original plan, prior to the beginning of the COVID-19 pandemic, was to analyze all these research concepts and objectives through a multisensory approach – namely the sense of sight, the sense of hearing, the sense of smell and the sense of touch, and how each provided a specific experience of the place in question (Borg 2021).

> The sense of place, … does indeed emerge from the senses. The land, and even the spirit of the place, can be experienced kinetically, or kinesthetically, as well as visually. If one has been raised in a place, its textures and sensations, its smells and sounds, are recalled as they felt to a child's, adolescent's, adult's body.
>
> *(Lippard 1997, 34)*

And art is also a form of expression through the sharing of narratives, visuals, sounds, performance, and other means of communication that convey one's feelings and experiences through different senses (Matarasso 2019).

In the adaptations and shifts of the project's qualitative research methods, the multisensory approach was maintained as per the original intention though some changes were required, namely the removal of the tasks that revolved around the sense of touch as this would have increased the risk of contracting COVID-19. The exercises involving the other three senses – sight, hearing, and smell – were carried out, but with some modifications as explained in the next section.

Creative and experimental qualitative research methods employed during pandemic times

Transitioning online

The onset of the online research workshops with the group of locals felt quite overwhelming and it was extremely challenging to predict how the participants would respond to the research project, to the tasks presented, and to the group dynamics. As the leading artist-researcher I felt the need to move at a slower pace than usual so as to be able to better assess what could be carried out in a remote manner, what resources were available to the participants, and what type of skills and abilities the participants themselves offered. For this reason, while having the objectives still in place, the new methodology plan had to unfold workshop by workshop (Borg 2021).

One of the key characteristics of participatory and community art is the focus on the process, whereby participants learn from each other through their shared stories and "together, they face obstacles and share talents, make demands, become friends, develop skill, knowledge and confidence, explore their place in the group and discover new stories about themselves. Such things occur spontaneously in the process of co-creation" (Matarasso 2019, 95). And as the process of co-creation often takes place in a spontaneous manner, it also challenges and overcomes the formal procedures of certain protocols (Helguera 2011) usually associated with group structures.

With the aim of maintaining this spontaneity, that could usually be created organically through a group mapping exercise with a chart and a set of markers, the first few tasks made use of online interactive presentations to generate in real time a number of collective word clouds, as shown in Figure 4.2, and a Q&A list, documenting the initial thoughts of the inhabitants about their hometown Gżira, together with their likes and dislikes. The intention here was to depart from common ground, and although a representative of the partnering NGO FAA was present throughout the entire session to help out and intervene as necessary when technological and digital literacy issues cropped up, two of the elderly locals still found this methodology rather challenging, and, to a certain extent, felt excluded from the group. The main challenge they encountered was to switch from the Zoom window to their browser where they could access the online interactive presentation. Indeed, after the workshop one of these elderly participants called me to express the frustration encountered (Borg 2021) and requested a demonstration of how to use the digital tools prior

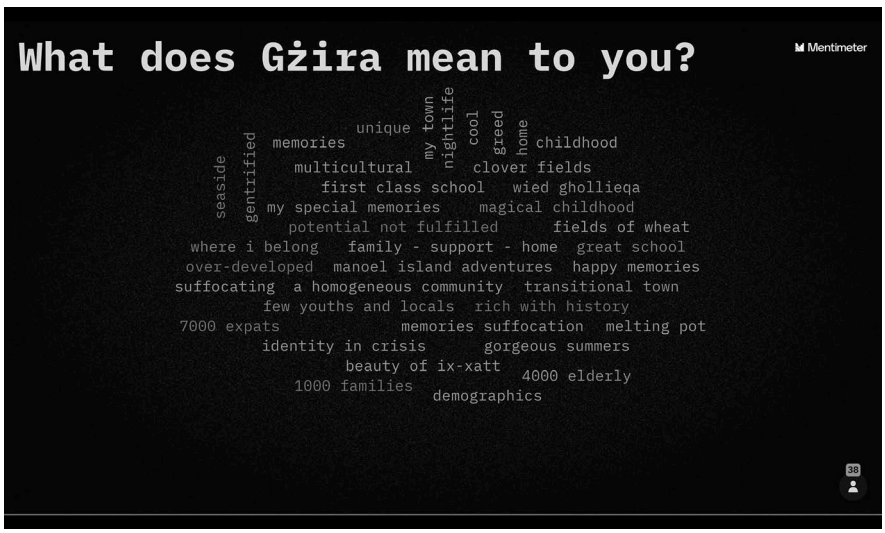

FIGURE 4.2 An example of one of the online collective word clouds generated by the locals' group. Screenshot taken by the author.

to every workshop. The luxury of the time that such guidance would have required was not available. Hence, the methodology of using online interactive tools had to be revisited.

For the workshop that followed Borg (2021) opted for a more old-school approach using paper and pen – basic resources that all participants had access to. The focus was on narrating personal anecdotes and/or memories, and the participants were invited to give their story a title by writing it on a piece of paper, that was then shared by collectively showing the paper to the computer's camera, replacing one's face. "Almost imitating the presence of a photographer during in-person workshops" (Borg 2021, 231), a screenshot of all these papers was taken, as presented in Figure 4.3. What might sound like a very simple and basic task, and perhaps slightly overused during the pandemic times, actually resulted in a very challenging exercise, once again for some of the elderly participants. Whereas the majority of the community members could easily decipher the objective of such a task, not all of the elderly participants could comprehend how to show the paper to the camera, at times having it out of focus and at times completely cropped out. What was planned as a two-second action, ended up taking a few minutes until the collective screenshot was taken.

Simulating the in-person experience online

After the first two online workshops with the locals' group, the lack of in-person human interaction became a concern, especially when thinking of the community members' takeaways of such an experience. As the artist-researcher I felt the need to render the process more tangible (Borg 2021). Being authentic, honest, and direct were important prerequisites in developing a relationship based on mutual trust, evolving into better engagement and productivity

FIGURE 4.3 A more old-school approach using paper and pen during an online session with the locals. Screenshot taken by the author.

(Helguera 2011; Hope 2015). Indeed, this concern was discussed with the group of the locals, and it was agreed to transition to the use of journals, one per participant. The journals, which were handmade by myself as artist-researcher and sent by post during the partial lockdown, as shown in Figures 4.4 and 4.5, acted just the same as "… small gestures (such as providing food and a comfortable space) can go a long way in encouraging conviviality. The challenge … is how to adapt successful models … to the realities and possibilities of the environment [the artist] is working in" (Helguera 2011, 57). The journals were used for writing of notes, drawings, and pasting of images, photos, and found material, namely in relation to the mapping of Gżira's transformation as experienced through different senses. Prior to posting the set of handmade journals, decisions on how and when to use them were clarified with the group (Borg 2021).

The first exercise that mapped the transformation of the town of Gżira was carried out through a photovoice exercise, focusing on the sense of sight. Photos have the ability to share the memory of a place, help fill knowledge gaps about that place, and at the same time trigger concerns about changes of/in the place (Lippard 1997). The original plan was to hold this exercise in-person and on-site in Gżira's public space whereby participants would have paired up and worked together in identifying and capturing a strong element and a concern in their hometown, while also reflecting on how this changed from the past to the present reality. This was adapted to an individual exercise and the participants had to work on the task after the online workshop, in their own time. Basic photography skills were explained verbally during the workshop and further consolidated through an email and, in some cases, individual phone calls.

FIGURES 4.4 AND 4.5 The handmade participant journals. Photos taken by the author.

Further adaptations were required when participants were not in possession of a camera or a smart phone; these included references to found online or printed images, old and/or past photos and drawings. Interestingly, no one opted for the latter methodology, and in one case a participant was helped by the neighbor – who happened to be another participant of the project – to transfer the photos from the phone and send them via email. All photos and images were fixed in the handmade journals and some of the participants preferred to explain the choice of their photos by adding a descriptive text (Borg 2021) – some handwritten, some typed, depending on their fine motor skills.

Similar to the sense of sight mapping exercise, the other two tasks, focusing on the sense of smell and the sense of hearing respectively, also encouraged the participating locals to reflect on how the smells and sounds present in their hometown changed across the years. These two tasks were also originally planned as an on-site exercise, where the participants would have gone on a group walk to search for the prevalent smells and sounds, and contrast them with those that they could recall through memory. The former sense was instead explored during the online session, and the latter sense was investigated after the session, on individual basis, as preparation for the next workshop. As some of the participants shared, the sense of smell is gradually being lost and

when they were encouraged to leave the Zoom meeting room and have a short walk around their house in search of surrounding smells, they indeed found it challenging to activate this sense. This experience was paralleled in the sense of a hearing exercise where present-day local sounds are all overridden by a uniform noise, that of construction work and road traffic. All the participating locals opted to reflect on these two senses through a writing piece in their journal, with the exception of two participants who opted to add an audio recording of the predominant present-day sound of construction work (Borg 2021).

Convening in-person

Once the partial lockdown was lifted in April 2021, sessions could transition to in-person meetings held at Gżira's band club premises. This allowed the fishers to start off the research process with the adaptations already outlined in previous sections, namely that of a reduced number of sessions since by then time became a limiting factor. As already discussed, digital means were not an option with this group and so their sessions revolved around conversations facilitated through the memory objects they brought, namely in relation to their fishing knowledge and experience (Borg 2021).

Once both working groups – the ten locals and the five fishers – reached the same stage of the research process, they could merge together as one group of 15 participants to start developing and processing the research outcomes. However, this also presented a set of challenges. Firstly, as previously discussed, three of the locals could not join any in-person sessions, and so these were repeated twice, once in person, once online. Secondly, the transition to in-person sessions had to follow strict COVID-19 safety measures: temperature check, use of hand sanitizer, wearing of a face mask, and physical distancing. The latter two proved to be very challenging during the hands-on tasks carried out in three small sub-groups. Such safety measures hindered the communication process when designing posters and postcards that communicated the participants' concerns and their visions for a better future Gżira. This set of designs was later shared with the public through a series of guerrilla actions: mailing of the anonymous postcards to all of Malta's members of parliament, Gżira's local councillors, and the press, and putting up the posters at specific construction sites in Gżira.

The final step of the research project was to translate the outcome into a final shared experience, specifically a co-created community performance piece in Gżira's public space, on land and at sea. This happened in September 2021 when local events were still obliged to follow the COVID-19 health and safety measures, and this presented one final challenge. The performance was structured in a certain way where the audience could experience it in small bubbles of six individuals. While at moments this could be perceived as somewhat fragmented, it presented a more intimate and immersive experience.

Discussion

A collective effort in participatory and community arts practice is key to overcome any challenges encountered throughout the process. *Batman Gżirjan* is an example of how a group of community members together with an artist-researcher responded to the challenges and limitations presented by the situation and context of the time, that is, the impact of the COVID-19 global pandemic. The power of collective effort is not really in its form of plurality – a group of individuals – denoted by the first plural pronoun "we", "but because 'we' can take on the aspect of seeming unity. 'We' is a front that allows us to move forward: created by action to complete that action" (Bass 2015, 177).

Action lies at the foundations of artistic activism, which draws from culture, in order to create culture and further influence culture (Duncombe and Lambert 2018). It is diminishing to expect that art will solve the "structural inequity" (Haeg 2015), and *Batman Gżirjan* never assumed it had the direct potential to do so or to fill in the gaps. In recognising the need to change as a choice and a response to the demands of the context – thus, the situation, the time, the communities, and the environment – the project interconnected with the everyday, engaging in critical practice to contribute with different methodologies, interpretations, and perspectives (Papastergiadis 2008) that could be further used, referred to, and explored across time and space, opening up new avenues for future audiences.

While remaining faithful to the original research concepts and objectives, characterized by an ongoing mutual dialogue and by ironizing and problematizing the issue of over-construction and private development that is not in the best interests of the Gżira inhabitants, thus provoking reflection (Helguera 2011), *Batman Gżirjan* felt a genuine need to continually revisit its artistic qualitative research approaches. By changing methodologies and adding new tools, such as the handmade journals, the project responded and adapted to the needs of the participating community members, as impacted by the COVID-19 pandemic of the time. This revisiting ensured a safe space for a mutual encounter, discovery, investigation, exchange, and divergence, making the research process, and thus the wider project, more accessible for the diverse needs and preferences of all involved (Matarasso 2019).

Conclusion

This chapter discussed the shift of the qualitative research approaches employed by the socially engaged artistic-research project *Batman Gżirjan*, when impacted by the COVID-19 global pandemic. The discussion outlined the original research plans, and further presented, on the one hand, the concepts and objectives that were maintained, and, on the other hand, the changes that were required and the motivations behind such decisions. This was discussed in relation to the creative tools and innovative, experimental approaches that adapted to the needs of the context and of the participating community

members, while also identifying the challenges that such changes entailed. Ultimately, *Batman Gżirjan* prompted people – be they the artist-researcher, the community members participating in the research process, or the audience members of the final co-created community performance – "to question the world as it is, imagine a world as it could be, and join together to make the new world real" (Duncombe and Lambert 2018).

Notes

1 The term "Gżirjan" refers to "someone from Gżira" in Maltese; hence, the project title *Batman Gżirjan* loosely translates to "Batman from Gżira".
2 *Flimkien għal Ambjent Aħjar* is a non-profit, non-governmental organization, established in 2006, committed to protecting and preserving Malta and Gozo's environmental and cultural heritage for an inclusive and sustainable quality of life.
3 *Inħobbu l-Gżira* is a Gżira-based community pressure group established in 2018 to stand up for the well-being of the community, the environment, and heritage of the locality, focusing on the town's promenade and the complementing seafront public garden, as well as the adjacent Manoel Island which has been identified as a site for private development. FAA strongly supports the campaign of these Gżira community activists.
4 Borg (2021) defines "power" as "the ability to have control and authority as gained through economic means, legal means, political influence, nepotism and similar advantages" (223).
5 Borg (2021) defines "powerless" as "a local inhabitant or community groups that lack the necessary resources and equal advantages to stop or control the powerful" (223).

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5

RESEARCHING LANGUAGE AND COMMUNICATION DURING THE COVID-19 PANDEMIC

A linguistic duo-ethnography

Sarah Hopkyns and Melanie van den Hoven

In the spring of 2020, the COVID-19 pandemic not only impacted health, politics, education, and the economy, but also restructured social relations and resulted in "rethinking how to live and work" (Ryan 2023). As transnational academics living and working in Abu Dhabi, United Arab Emirates (UAE), the pandemic restructured our routine ways of thinking about work and research, including our ways of researching language in society. During the early days of the pandemic in the UAE, our first lockdown heightened our focus on sociolinguistic changes. For example, the proliferation of COVID-signs introduced new patterns of communication as well as new COVID directives in newspapers, government announcements, and on social media. As sociolinguistics, our observations centered on documenting examples of pandemic communication with a focus on access, linguistic hierarchies, power, and inclusion in linguistically diverse settings. As the UAE is a multilingual and multicultural country, with 88.5% of the general population and more than 90% of the working population being non-citizens from almost 200 countries (Nickerson 2015, 240), observations of multilingual communication or lack thereof were at the forefront of our research. While effective communication in linguistically diverse contexts is important in ordinary times, the importance of clear and accessible messaging multiplies during a crisis.

From the early days of the pandemic, our communication patterns began to rely heavily on technology as was the case with COVID-era communication and qualitative data collection in general (see Calvo et al 2024; Russo 2024; Abaunza 2024, all this volume). Rather than meeting over coffee, as we did during pre-pandemic times, our face-to-face conversations migrated to WhatsApp. Our repertoires of messaging expanded from texts to include voice memos, pictures of signage, academic articles, and news updates. Our messaging turns became more frequent and in-depth as our interest in the linguistic landscapes of the COVID era grew with

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each new development. Although our original studies involved the analysis of language and semiotics on COVID signage in our own neighborhoods and comparative contexts (Hopkyns, 2020, 2022a; Hopkyns and van den Hoven, 2022a, 2022b, 2023), it became apparent to us that not only the content of our study, but also our "way of researching", or research methods, was worthy of investigation.

Looking reflexively on our detailed correspondence during the COVID-19 years, our process of documenting the changing world around us, in fact, prompted an "adaptive method" (Ryan et al 2024, this volume) of researching new orientations to words, texts, place, artifacts, and ourselves as a team of two researchers. From May 2020, we began to refer to our research method as linguistic duo-ethnography (LDE). In this chapter, we discuss how the methodologies of linguistic ethnography and duo-ethnography converge to create a linguistic duo-ethnography. We then discuss our own linguistic duo-ethnography which focuses on the social phenomena of language and communication during the COVID-19 pandemic. We give emphasis to the role of place, artifacts, and ourselves as interactants in our study. We then share four significant strands, which expose our dialogical approach and transnational orientations to our environments, concluding on the benefits of this method for future research.

The method of linguistic duo-ethnography (LDE)

Our study employs a novel approach, "linguistic duo-ethnography (LDE)", which combines the two existing methods of "linguistic ethnography" and "duo-ethnography". The following sub-sections will explore the subtleties of both approaches and how they converge in our LDE.

Linguistic ethnography

"Linguistic ethnography" as a term is in itself compiled of two concepts: Linguistics and ethnography. The term has grown in prominence within applied and sociolinguistics over the last two decades (Tusting 2020). By researching "language in social life", linguistic ethnography is about "making the familiar strange" by forging connections between language use and wider social and historical structures (Copland and Creese 2015). Linguistic ethnography involves the study of "local and immediate actions of actors from their point of view and considers how these interactions are embedded in wider social contexts and structures" (Copland and Creese 2015, 13).

There is some debate about whether linguistic ethnography is a field, subdiscipline, or a methodological approach. Tusting (2020, 1) stresses that rather than fitting neatly into a category which is fixed or bound, linguistic ethnography represents a "growing body of work from researchers who share a commitment to combining ethnographic approaches to research with close attention to language use". As Rampton et al (2004) state, as with any ethnographic research,

linguistic ethnography requires sensitivity and in-depth understandings of specific settings and openness to complexity, contradiction, and re-interpretation.

Previous studies using linguistic ethnography in applied and sociolinguistics have employed a range of data collection tools and approaches such as participant observation and field notes (Papen, 2020), ethnographic interviews (De Fina 2020), micro-analysis of spoken interaction (Heinrichsmeier 2020), collaborative ethnographies (Budach 2020), reflexivity (Patiño-Santos 2020), researching multilingually (Costley and Reilly 2021), and digital approaches to linguistic ethnography (Varis and Hou 2020).

Duo-ethnography

A second element of LDE involves *duo-ethnography*. The term "Duo-ethnography" refers to research involving "people of difference reconceptualizing their stories of a particular phenomenon in juxtaposition with one another" (Norris and Sawyer 2017, 1). Usually, as the name suggests, two researchers work together in duo-ethnographies, although in some cases more than two researchers could be involved. When more than two researchers are involved, it is also known as a "collaborative ethnography" (Budach 2020). In duo-ethnographies, the researchers "enter into deep conversations, examine their own and the deep-seated beliefs of their interlocutors and, as a result, reconceptualize their perspectives and actions" (Werbińska 2020, 270). According to Sawyer and Norris (2013), the central tenants of duo-ethnography (Table 5.1) are "living" as they emerge and develop as they are used.

Previous applied linguistics studies which use duo-ethnography as a research method have explored a range of topics and in a wide variety of forms. Topics of previous duo-ethnographies include "native-speakerism" (Lowe and Kiczkowiak 2016; Rose and Montakantiwong 2018), teacher and learner identities (Werbińska 2019), teacher-training courses (Huang and Karas 2020), and COVID-related educational issues (Le et al 2021). Some use in-person dialogues, such as duo-ethnographers Norris and Sawyer (2004) who used long car drives to record their dialogues on their research subject. Others use mainly or solely online dialogues either by preference or due to COVID times (Jing and Reynolds 2022). Online conversations in some cases are audio-recorded using platforms such as Zoom (Huang and Karas 2020). Other duo-ethnographies combine photography with ethnography (Le et al 2021) or the analysis of cultural artifacts as well as critiques from audience members at conferences which direct and shape their dialogues (Norris and Sawyer 2004). Regarding researchers as participants or interactants, some duo-ethnographies have included more than two researchers but still call their method "duo-ethnography" (Jing and Reynolds 2022) or in some cases such studies are called "collaborative ethnographies" (Budach 2020) or "trio-ethnographies" (Le et al 2021).

TABLE 5.1 The tenants of duo-ethnography (from Sawyer and Norris 2013, 23–24)

	Tenants of duo-ethnography
1	*Currere* (informal curriculum) as a frame for investigation and transformation via joint meaning making process and reconceptualizing beliefs and actions.
2	*Voices "in brackets"*: Duo-ethnographers position themselves in the text in neutral ways.
3	*Self as research, not topic*: Duo-ethnographers consider the self as a context for the analysis of their experience, not the focus of inquiry.
4	*(Re)storying the self and the other*: The aim of duo-ethnography is to reconceptualize experiences.
5	*Quest(ion), not hero/victim:* Duo-ethnographers do not place themselves as heroes.
6	*Fluid, recursive, layered identity*: Focus is placed on a postmodern understanding of identity as layered, contradictory, changeable, and uncertain.
7	*Understanding not found – meanings created, exposed, and transformed:* Meanings are sought in the dialogue.
8	*Emergent, not prescriptive*: The goals are not predefined but emerge from the dialogue.
9	*Communal yet critical conversations as dialogic frame*: Duo-ethnographers question and promote contrasting views of the topics under consideration.
10	*Trust and recognition of power differentials*: The power differential is addressed directly if needed.
11	*Place as participant*: The place (geographical, political, social etc.) from which duo-ethnographers speak contributes to dialogues and leads to change.
12	*Literature as participant*: Literature informs the research and is recalled in the study.
13	*Difference as heurism*: Working in tandem leads to new insights on one's experience and opens new perspectives on the experience.
14	*Reader as co-participant and active witness*: Readers are active participants as they are invited to judge and respond to a text.

Linguistic duo-ethnography (LDE)

Our novel approach of *linguistic duo-ethnography* (LDE) combines the methods of linguistic ethnography and duo-ethnography. As a qualitative method, LDE explains our way of researching as a twosome focusing on language in society during the COVID-19 pandemic years. Through LDE, we engaged in interactive discussions of our changing lived realities and language related to the pandemic, such as the linguistic landscapes of our neighborhoods and other forms of communication.

In the following sections, we outline our LDE related to COVID-19 language and communication by firstly introducing ourselves as interactants in the study and our place(s) / setting(s) as well as artifacts as co-interactants. We then outline our methodology and a small sample of our findings.

Interactants in linguistic duo-ethnography: Researchers, place, and artifacts

As sociolinguists we both had a primary interest in researching social questions revolving around language. However, as researchers we differed in terms of background, life experiences, and professions amongst other factors. Such differences allowed us to approach the research from varied positions. We also recognized our global connectivity and locality "might vary since the notion of belonging might be perceived and conceptualized differently among us" (Le et al 2021, 4).

The first researcher (Sarah) is from the UK. She is also a citizen of Canada, where she lived for ten years before moving to the UAE in 2012. Sarah considers herself a "mobile academic" (van den Hoven and Hopkyns 2023) as she has lived and worked in higher education in many global contexts including Japan, Canada, and the UAE. At the time of the study, she was an assistant professor at a government university in Abu Dhabi, UAE, where she had lived for the last decade with her husband and young son. Sarah's linguistic repertoire includes English as her first language and basic knowledge of Arabic, French, Japanese, and Russian. During much of the first year of the pandemic (spring 2020–2021), Sarah experienced emergency remote teaching and learning (ERT&L) which meant teaching and learning mainly via Zoom. This form of learning was accompanied by added context-specific challenges in the UAE whereby Emirati female students cannot show faces online due to cultural and religious norms and beliefs (Hopkyns 2022b, 2023; Hurley and Al Ali 2021). Such dynamics added an extra layer of isolation to Sarah's working life in the pandemic's first year.

The second researcher (Melanie) is from Canada. She is also a recent citizen of the Netherlands due to her Dutch and Indonesian family heritage. She was a "mobile academic" in South Korea and the UAE before moving to a position in industry five years ago. In her industry position, she coordinated a team of interpreters and advised colleagues on intercultural communication strategies in a multicultural and high security work environment. During the early months of the COVID pandemic, Melanie was classified as an "essential worker" and she was restricted during the lockdown period to her work accommodation near the Saudi Arabian border. Melanie has English as her first language. She also speaks French and Korean at an intermediate level and has receptive skills in Dutch. Melanie was living alone in the remote area in a male-dominated worksite. The high-security environment did not permit mobile phones at the worksite, in what was named 'the red zone'. Melanie relied on asynchronous communication, when in her work accommodation of "the green zone" on site. This added to her sense of isolation during the early months of the pandemic.

As UAE-based sociolinguists and researchers, we first met at an academic conference in 2014 at the "Fifth Annual Gulf Comparative Education Society Symposium" in Dubai where we were presenting our PhD research. We first started to collaborate in 2018 when we organized a symposium together at the

"Multidisciplinary Approaches in Language Planning and Policy Conference" in Toronto, Canada, and another the following year at the "Languaging in Times of Change Conference" at the University of Stirling, Scotland. When the pandemic started, however, our shared interest in language and society during COVID times led our academic collaboration and friendship to deepen.

A key tenant of duo-ethnographic research is the role of researchers as participants (see Table 5.1). We thus moved beyond being participant observers (Spradley 1980) to empathetic witnesses and listeners. Our research conversations were shaped by our different expertise (Norris et al 2012) as well as interdisciplinary approaches as workers in different domains (Copland and Creese 2015). Our similarities and contrasts invited active listening and empathy with the emotions and dilemmas around adjusting to pandemic-era living. A further tenant of duo-ethnography is the inclusion of "place" and "artifacts" as "co-participants" (Huang and Karas 2020; Sawyer and Norris 2013, 23–24) or co-interactants in the research. We draw on context-specific elements (such as cultural norms, local signage and pictures) which are unique to our "place" together with artifacts from the wider world (such as academic articles and newspaper articles). By engaging as collaborative researchers, we aimed to produce a 'triangular relationship' between the text, the writers (researchers), and the reader which "enhances the nonlinearity of the duo-ethnographic process and allows for, and acknowledges, the meaning-making potential of stakeholders who may consume, and engage with, duo-ethnographies" (Huang and Karas 2020, 71).

Methodology

Our linguistic duo-ethnography featured asynchronous conversations. We used WhatsApp messages in the form of text and media (voice memos, pictures, and memes) to update each other on observations, research tasks, agendas, and disruptions during the COVID-19 period. Our WhatsApp history stored our live field notes and reflections as well as screenshots and photographs as ethnographic data in different settings. Newspaper articles and academic papers were also shared via WhatsApp and email adding important contextual details.

Our WhatsApp conversations on the topic of COVID communication dramatically increased during the spring 2020 lockdown period. As was the case in many global contexts (Jaspal and Breakwell 2024; Najmah et al 2024, this volume), our movement was restricted to our live/work neighborhoods. In the early phase of the pandemic, our ethnographic data included photographs of COVID signage and observations about wider COVID communication. Daily walks to shops for essential items meant we had strategic opportunities to document the proliferation of COVID-19 signs, which popped out like "jack-in-the-boxes" in our places of work and residence (see Hopkyns 2020; Hopkyns and van den Hoven 2022a, 2022b), as well as to document media reports. In the pandemic's second year, when international travel was permitted again, we

broadened our documentation of COVID communication and linguistic landscapes to include comparative contexts of Chamonix, France (Hopkyns and van den Hoven 2023) and Vancouver, Canada (Hopkyns 2022a), amongst other multilingual locations such as Jeddah, Saudi Arabia and Nova Scotia, Canada. To this end, we worked in tandem as linguistic duo-ethnographers by posting messages about what we saw around us and discussing their significance. In adherence to the governing social structures of restrictions and violations, especially during the early months of the pandemic, online communication became the sole channel for co-constructing understandings of significance of new phenomena.

Our LDE research involved kind and critical conversations whereby we encouraged richer interpretations (Sawyer and Norris 2013). Recording our conversations allowed us to revisit, reconsider, and analye the dialogues at a later date (Lowe and Lawrence 2020). The dialogues featured artifacts to enhance our investigation. For example, photographs of signage, newspaper headlines connected with communication and language, and academic literature (Huang and Karas 2020; Sawyer and Norris 2013) populated our chats.

Our LDE data consisted of a large file downloaded from WhatsApp. This file included six years of correspondence from 2018 to 2023. The key COVID years of 2020 and 2021 were our main focus, but the surrounding years provided useful reference points to see changes and contrasting patterns in our communication and language pre-, during and post-COVID.

Our analysis of the WhatsApp data revealed a dialogical interactional pattern emerging, which is a characteristic of the medium of WhatsApp. One person says something and then, after a turn or two, the other responds to the original strand. The conversation in this sense is like a disrupted tennis game, as if there are two balls in the air. One person hits one and then pauses and then introduces the next ball and then the first one gets a response again. Equally, this style of conversation could be likened to braiding, double Dutch, or jumping two ropes with inevitable stops and starts. We both found this way of communicating satisfying and dynamic.

Findings and discussion

In this section, we begin with an overview of our communication across pre-COVID and COVID years (2018–2022) to provide context and an analysis of the changes to our exchanges. We then move on to present four significant strands in our data for closer analysis.

Overview of data: Amount, time, and mode of communication

When reviewing our pre-COVID conversations, we noted that the main topics were submissions to conferences, conference logistics, and submissions for publications. These messages were essentially status updates which were

supportive and practical but on a surface level. For example, we discussed attending a conference in Muscat, Oman weeks before the pandemic broke out. What was striking about our dataset as a whole (WhatsApp communication from 2018–2023) is the difference in types of media used and number of interactions between the pre-COVID years and COVID years (Table 5.2). Our pre-COVID interactions from February 28, 2018 – February 27, 2020 (21 pages of printed text) mainly involved texting with only 36 messages using photographs as media files. However, our messages from the following two years, February 28, 2020 – February 27, 2022, mushroomed to 748 pages of data which included 4,791 media files, which now featured voice memos, uploaded files, and memes as well as photographs.

Table 5.2 shows the dramatic increase in communication from the pre-COVID two-year period to the COVID two-year period. The second two-year period had 27 times as many messages, and the forms of communication were deeper with many long voice memos. The increase and range of data types reveals a shared impetus to interact meaningfully and reflexively engage with the unfolding social and linguistic changes of the COVID period. On analysis, we used WhatsApp to socialize and sympathize with each other as well as to co-construct meanings about new communication patterns in the places we inhabited.

First significant strand: Initiating collaborative research on COVID communication

The first significant strand of data we chose to highlight in this chapter was found at the beginning of the pandemic. On April 7, 2020, Melanie reported being "locked in" at work as an essential worker for an indeterminate period of time. Sarah was also informed that her spring break had been brought forward due to COVID. This meant Sarah's travel plans were cancelled and she would be teaching remotely until further notice. At this point, our conversations revealed that we were suffering from the uncertainty surrounding the pandemic. To cope with the ambiguity of the situation, we diverted our focus to research opportunities to be gained from the situation. Our dialogue in Table 5.3 starts with a discussion about a call for papers on COVID communication for a special issue journal article. We had missed the deadline by a

TABLE 5.2 Overview of data – Amount, time, and mode of communication

#	*Period*	*Dates*	*Pages of data*	*Number of media messages (voice memos, photographs, and memes)*
1	Pre-COVID (2 years)	February 28, 2018 – February 27, 2020	21 pages	36 media files
2	COVID (2 years)	February 28, 2020 – February 27, 2022	748 pages	4,791 media files

TABLE 5.3 WhatsApp correspondence marking the beginning of our research on COVID communication.

Exchange	*Speaker*	*WhatsApp dialogue on April 7 2020*
1	Sarah (text)	I just feel I'm in survival mode at the moment, to be honest.
2	Melanie (text)	I am also keen, but the deadline totally escaped my attention. I am in lockdown at the plant with no reference materials. But … could be persuaded.
3	Sarah (text)	They received over 200 abstracts and said CFP was closed but you never know … I kind of want to try … will think and tomorrow maybe send something with apologies for being late …
4	Melanie (text)	Okay let me know if you want a second author. My input would be western region and workplace as an essential worker.
5	Sarah (text)	Yes. Would write abstract for both of us. Will have to be tomorrow though. Yes, can you tell me more about your context? Have you taken any pics of COVID warning signs in English or other languages?
6	Sarah (text and images)	I think a point will be the dominance of English. I took these pictures today. It's my neighbourhood – a lot of expats but also Emiratis living here.

FIGURE 5.1 COVID-19 BE SAFE KEEP DISTANCE sign. Photo by Sarah Hopkyns.

FIGURE 5.2 Pharmacy working hours sign. Photo by Sarah Hopkyns.

Exchange	*Speaker*	*WhatsApp dialogue on April 7 2020*
7	Melanie (voice memo)	Sarah, there's been some interesting communication from Ruwais City around communicating how we're going to deal with it. Now the communications are all in English and they sort of highlight how we use social media. I can forward it to you. Now, what's different about Ruwais is that this is an industrial city and its really supporting oil and gas, and also the nuclear energy. It's protected so it means that we are going to be sequestered as a city and I'm already sequestered at the plant because we are essential workers and we need to be able to maintain the country's, you know, economic, er, main drivers really, right? So, the communication is clear and good and there's no real apparent evidence of Arabic here. So, it raises the question of which language is the official language here given that the operational language of the power plant is English. What's interesting about the power plant is that it's got a large community of Koreans, so this is where my work comes into play as I'm the line manager for interpreters and I'm interested in how they are interpreting Korean procedures, how they are dealing with COVID, right? And Korea has really flared up, so Koreans have taken a lot of important measures so we're translating from Korean to understand what half our company is going to be doing with this. So, it's kind of a different level of not really linguistic landscapes but it's around the efficacy of language of Korean English and the lack of a dominance of Arabic in terms of this social message and, um, of course everyone is participating in the world media and reading and sharing stuff but there's some particular questions which are uniquely from here. Like, if I have a permit and I have two wives, do I get a permit to go between my two wives' houses. These are questions that are just unique to here. So, I think we need to take a language and cultural take from the perspective of higher ed but also the perspective of workplace so we can do a description of the various phenomena and we can back it up. The UAE is really unique, and my workplace is really unique as it has Korean as a major language and a major source of understanding COVID practices. Sorry this message is long but it's much easier for me to say all these things than to type all these things. It's been a long day of work. I have a 50-hour work week this week.
8	Sarah (text)	Thanks Melanie. I just listened to this and there are some interesting questions raised and discussion points. I will listen again in the morning and try and put something together … It is fascinating, I can't really resist trying. Will be in touch again tomorrow.
9	Melanie (text)	Sure thing. Am at work and without cell phone during work at the plant during my shift. But will come out at about 3 to resume communication with outside world.
10	Melanie (text and link to article)	Here's the article I mentioned. https://gulfnews.com/uae/coronavirus-man-asks-for-permit-to-move-between-the-houses-of-his-two-wives-1.70850633

day but were passionate about the topic and wanted to start brainstorming ideas. The rest of the dialogue involves us sharing initial impressions as field notes from our different contexts. Our language and word choices reflect the realities of pandemic living. For example, Sarah states, "I'm in survival mode" (Exchange 1) and Melanie states, "I am in lockdown at the plant with no reference materials" (Exchange 2). These are notable as vocabulary such as "survival mode" and "lockdown" belong to this specific period of time. Despite voicing hardships associated with the pandemic, our research ideas and conversations sparked a productive way of coping with the unfolding events.

In addition to the incursion of new terminology, our conversations in April 2020 featured more media files weaving into our messages. As shown in Table 5.3, Sarah shared images of COVID signage in her neighborhood (Exchange 6) and Melanie responded with a long voice memo regarding the linguistic and cultural dynamics of her workplace in industry (Exchange 7).

The dialogue in Table 5.3 introduces place as interactant. Within the familiar cultural norms of Abu Dhabi as a place, our study tunes into and exposes the languages of the specific locale and topics that arise as newsworthy given the social restrictions. Such topics provide new discussions about the cultural dimensions of "home with family". Our dialogue touches on the placement of signage in their social environment, the choice of languages, and the topical reports about moving among homes, showing sensitivity to the complex dynamics of the spaces we navigated.

Second significant strand: Engaging with firsthand comparisons around international travel during the pandemic

The second significant strand appears through a dialogue which took place a year later on April 2 and April 3, 2021. This period was significant as we shared experiences of international travel for the first time since the pandemic began. Sarah travelled to her second home of Vancouver, Canada for a semester-long research sabbatical. She travelled with her family as her son was able to do distance learning via the "Seesaw" interactive learning platform from his Abu Dhabi-based international school. Melanie had travelled to her second home of Chamonix, France a month earlier to be with her partner (now husband) who was living there. She had since returned to Abu Dhabi for work. Our experiences of quarantining in hotels and our homes as part of the COVID travel requirements shapes the conversation strand. Sarah starts by announcing her safe arrival in Vancouver. She briefly shares her experience of her three-night mandatory hotel quarantine and some images of monolingual, bilingual, and multilingual airport signage. Melanie responds by voicing emotions of pride but also homesickness related to the Canadian pictures. The conversation then moves on to shared experiences of quarantining after travelling.

TABLE 5.4 WhatsApp correspondence relating to first international travel during the COVID period

Exchange	*Speaker*	*WhatsApp dialogue on April 2–3, 2021*
1	Sarah (text and images)	We arrived in Vancouver safely ☺ Quarantine hotel was tough with only two 20-min "wellness breaks" outside each day. Sharing some signs from Toronto and Vancouver airport.

FIGURE 5.3 'Masks mandatory' sign in Toronto. Photo by Sarah Hopkyns.

FIGURE 5.4 Bilingual 'Welcome to Vancouver' sign. Photo by Sarah Hopkyns.

FIGURE 5.5 Multilingual sign in Canadian airport. Photo by Sarah Hopkyns.

Exchange	*Speaker*	*WhatsApp dialogue on April 2–3, 2021*
2	Melanie (text)	Fascinating! Noticed the Vancouver bilingual sign and felt a little proud. Also felt a pang of homesickness.
3	Sarah (voice memo)	We're quarantining in our condo for another 10 days now. I'm using data on my phone at the moment. They delivered the modem yesterday when we were on our way from the airport and then took it back again. Now it won't be delivered until Tuesday because of the Easter weekend. They are enforcing stricter restrictions for the Easter weekend. I guess they're scared of people getting together over the holiday. So, I know you said to keep documenting signage here, and I will because I think this is also a really interesting context. I also took a lot of pictures of the experience, I suppose, of the lock down hotel. That's also interesting in itself, but yeah, in Vancouver, as soon as we finish quarantining and we're free to walk around, I'll be taking lots of pictures of signs, I won't be able to help it.
4	Melanie (voice memo)	Hey, Sarah. In a way the quarantining period is a gift the universe is giving you to really really relax. Again, I think I mentioned that when I went to France, you know, there was only a three-hour time difference, but I was so tired from it. We had one-week quarantining and it was easy to do because we were used to it already. I'm going to forward you an image from today's paper which is contradictory to the news in France where Macron is treated like a superhero. But here he's criticized for a really late response. It's interesting how he's let people be as free as possible until it's no longer supportable and now it's a liability.

In Table 5.4, there is an overall feeling of resilience whereby the experiences and research opportunities in these new settings offset the difficulties. This is evident in Sarah's excitement at the prospect of exploring the COVID linguistic landscape of Vancouver when stating, "as soon as we finish quarantining and we're free to walk around, I'll be taking lots of pictures of signs, I won't be able to help it" (Exchange 3) and in Melanie's advice to Sarah when stating, "In a way the quarantining period is a gift the universe is giving you to really really relax" (Exchange 4). Melanie continues the comparison by reporting on the ease of quarantining in France. She goes on to add sociopolitical commentary on the critical portrayal of Emmanuel Macron's COVID policies in the UAE media, which differs from the positive appraisal in the French media. These conversations later develop into analyses of French signage showing evidence of "talking back" to COVID-19 regulations as seen in the "gilet jaune" spirit of political participation possible in France which is not seen in Abu Dhabi (Hopkyns and van den Hoven 2023).

Third significant strand: Engaging with outside perspectives on the pandemic

The third strand, reflected in the dialogue in Table 5.5, took place two weeks' later on April 19, 2021. The dialogue represents an initial interaction with international

TABLE 5.5 WhatsApp correspondence relating to engaging with a COVID webinar

Exchange	*Speaker*	*WhatsApp dialogue on April 19, 2021*
1	Melanie (text)	Sarah, I am here ready for the pandemic webinar. Long day for me. Hope I can sit so long.
2	Sarah (text and image)	So early for this here – 6am.

FIGURE 5.6 The COVID-19 Pandemic Conference. Photo by Sarah Hopkyns.

3	Melanie (text and image)	I'm in. Starting now.

FIGURE 5.7 Michael J. Ryan leading the COVID-19 Pandemic Conference. Photo by Melanie van den Hoven.

4	Melanie (text)	I felt a huge relief as an essential worker. I felt what he said.
5	Melanie (text)	Especially as a separated person solo.
6	Melanie (text)	It would be impossible to get these kinds of stats for the UAE.
7	Sarah (text)	Really interesting points on parks and public transport too.
8	Melanie (text)	Yes. Do you have the book with this chapter with you?

Exchange	*Speaker*	*WhatsApp dialogue on April 19, 2021*
9	Sarah (text and image)	Scott is chapter 5.

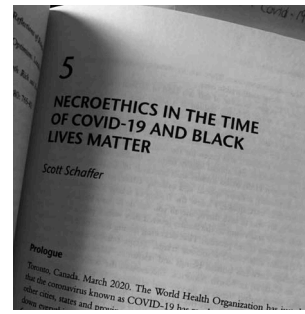


FIGURE 5.8 Chapter on 'Necroethics in the time of COVID-19 and Black Lives Matter' by Scott Schaffer in *COVID-19: Volume I: Global Pandemic, Societal Responses, Ideological Solutions* (Routledge, 2020). Photo by Sarah Hopkyns.

10	Melanie (text)	Phew. We can cite him. We did not get exposed to an anti-government theme in the UAE. This is something we can note in our Abu Dhabi Chamonix paper.
11	Melanie (text)	Do we have James Meeker in our book? Anti-rational theme. Anti-science.
12	Sarah (text)	In the other volume. I have it, but not here with me. It's also very good. But one I have with me is more relevant to our research.
13	Sarah (text)	So interesting – age of anti-rationality. See that in Vancouver – mask resisters.
14	Melanie (text)	Surveillance. Big in UAE not in Chamonix.
15	Sarah (text)	

FIGURE 5.9 Anti-lockdown poster in Vancouver, Canada. Photo by Sarah Hopkyns.

Evidence of this mentality in Vancouver. This tiny sign was posted at a downtown bus stop. General respect for Dr. Bonnie but some resistance here. Will tell you more in voice memo after webinar.

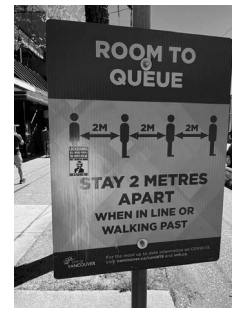
Exchange	*Speaker*	*WhatsApp dialogue on April 19, 2021*
		

FIGURE 5.10 Anti-lockdown poster at Vancouver bus station. Photo by Sarah Hopkyns.

16	Melanie (text)	Fascinating. Many American leaders at the plant have this neoliberal attitude.
17	Sarah (text)	Nice quote "pandemic is a blessing for neoliberalism." There is no "we" when the going is good.
18	Melanie (text)	Yes.
19	Melanie (text)	I have to miss the last session. Can you give me an update on it?
20	Sarah (text)	Sure. Will send voice memo after the session.
21	Sarah (voice memo)	Hi Melanie, the last session focused on the start of pandemic and then global responses. He talked about deaths in the West. I asked a question related to this. Well not really a question but a comment. I said that I've experienced two contexts in the COVID pandemic, Abu Dhabi, UAE and also Vancouver, Canada, and I noticed there are different behaviours. In the UAE the bottom-up signs we see are always instructional or informative. They don't voice opinions on mask-wearing but in Canada, like the sign I showed you earlier, these bottom-up signs are sometimes saying that social distancing and mask wearing do more harm than good in terms of mental health. People in Canada feel that they can put that out there into the community. So, I asked him to comment on the relationship between 'more deaths in the West' and following or not following top-down rules. He did and a few people in the chat box wrote some interesting responses too related to collectivist and individualist societies.

academics during an online 'COVID-19 pandemic conference'. Melanie attended the webinar from Abu Dhabi and Sarah from Vancouver. The conference was organized by J. Michael Ryan and the presenters were authors of the chapters in the first two books in his Routledge Pandemic series (Ryan 2021a, 2021b). This online platform invited our real-time comments to the presenters while our

WhatsApp chats were also used synchronously to exchange our ideas on our own context. In Table 5.5, we discuss themes of COVID anti-rationality, anti-lockdown protests, and surveillance (Meeker 2020: Schaffer 2020; Ryan and Nanda 2022), as they relate to our own contexts. Here the academic talks and literature act as 'interactants' in our linguistic duo-ethnography while the images of the event become artifacts documenting our participation in analyses of the social impact of the pandemic in other global contexts.

In response to the topic of anti-lockdown protests, Sarah shares images of signage in Vancouver where a small handmade poster has been pasted to a bus stop social distancing sign (Exchange 15). The images show that a sign-maker has openly questioned British Columbia's Provincial Health Officer Dr. Bonnie Henry's COVID-19 policies. While Dr. Henry's pandemic response, including her phrase "be calm, be kind, be safe" (Henry and Henry 2021) was generally viewed positively, the sign-maker felt free to voice resistance in a public place. Related to this, in Exchange 21, Sarah reflects on the last talk of the webinar and explains her observations around the differences in behavior regarding COVID rules and restrictions as seen in Abu Dhabi and Vancouver. This exchange shows a widening of research focus, where a comparative "transnational lens" (Le et al 2021) across global contexts was supported by technology. Our online engagement with the webinar and side chats on WhatsApp supported real-time synchronous interactions with the presenters and ourselves despite the geographical distance.

Fourth significant strand: Researcher positionality and transnational identities

A final strand shown in Table 5.6 a few days later, on April 21, 2021 shows a dialogue about the importance of positionality in our research. We discuss our identities as "mobile academics" and a resultant attachment to more than one home or "place". Melanie picks up on Sarah's earlier reference to a comparative paper on Abu Dhabi, Chamonix, and Vancouver. She then discusses positionality in relation to place, identifying different angles we bring to the research. Sarah adds that there are also similarities in their mutual recognition of Abu Dhabi as a "home". Melanie asserts in Exchange 3 that it is these similarities and divergences which "allow us to engage in the research meaningfully and with passion".

In Exchange 4, Sarah reflects on the unusualness of both researchers having direct access to two international contexts during the COVID pandemic, allowing them to use a "transnational lens" (Le et al 2021) as a privilege or an affordance in an era where travel restrictions only permitted citizens and their partners to return "home". This strand sheds light on a sustained reflexive account about access to two other international locations. The "privilege" of belonging to homes in locales other than where we worked, however, needed to be tempered by travel permits which required other uncomfortable adjustments to documenting compliance with COVID-19 testing, quarantining, and vaccine certificates.

TABLE 5.6 WhatsApp correspondence relating researcher positionality and transnational identities

Exchange	*Speaker*	*WhatsApp dialogue on April 21, 2021*
1	Melanie (voice memo)	Hi Sarah, I listened to your voice memo on the tri-city paper. I think we can position ourselves as 'mobile academics'. As mobile academics one of the privileges is that we are working in another environment and, well, the opportunities are amazing but one of the drawbacks is that we always have a home somewhere else and both of us are in intercultural relationships with someone from another citizenship, um, and therefore, um, we have to deal with 'home one' and 'home two' and how we navigate that. It becomes even more perplexing, how we respond, because travel is therefore important to us.
2	Sarah (voice memo)	True. I think we can also say that we share Abu Dhabi, so we have this point of comparison and these points of divergences, and we've already established a duo-ethnography based on our experiences and on linguistic and cultural observations, so we've established a way of working.
3	Melanie (voice memo)	Yes, and these similarities and divergences allow us to engage in the research meaningfully and with passion.
4	Sarah (voice memo)	Something else related to our positionality as mobile academics. When we were interacting in the webinars, it stuck me that we are quite unusual, you know, that you were able to go to Chamonix, and I was able to come to Vancouver during COVID's second year. And this falls into the whole debate about 'privilege and inequality' because most people wouldn't have access to a second location during the pandemic. I know we have good reasons for travelling and being in our second locations, but for most comparative studies, two researchers would be writing from different locations rather than both researchers having experienced two COVID locations each, three together. It's just a factor we should recognise as it relates to our positionality.

Conclusion

This chapter has outlined the development of an innovative research methodology we call "linguistic duo-ethnography" (LDE), showing the sustained dialogical exchanges between two transnational researchers based in Abu Dhabi, UAE. We highlight the impact of the COVID-19 pandemic on the content and format of our communication. The development of our LDE was stimulated by pandemic conditions. Our reliance on WhatsApp messaging enabled communication using texts, asynchronous voice memos, images, and uploaded research articles. This interaction increased suddenly with the onset of the pandemic, necessitating sense-making of the changing language use across time and across three global contexts, Abu Dhabi, UAE, Vancouver, Canada, and Chamonix,

France. This engagement not only resulted in publications about COVID linguistic landscapes and communication (Hopkyns 2020, 2022a, 2022b, 2023; Hopkyns and van den Hoven 2022a, 2022b, 2023), but it also sharpened our transnational lens leading to critical examination of not only language choices and language practices, but also the ways we collaborate as researchers. Restrictions on meeting face-to-face forced a need to contend with uncertain times. Our LDE allowed us to navigate these changing realities together. Our LDE accounts for new words, new ways of communicating, and new stances developed while researching the changing world.

The chapter explained the elements of LDE as a hybrid approach which combines "linguistic ethnography" and "duo-ethnography" as well as key tenants of duo-ethnographic research such as "researchers as interactants" and "place and artifacts as interactants". In this chapter we acknowledge the difficulties in pursuing fieldwork during the COVID pandemic times but argue that despite pandemic-era restrictions, our way of researching as linguistic landscapers and ethnographers was strengthened by the affordances of WhatsApp technology, as is the case in other contexts (Sánchez García et al, this volume). Our LDE positions Abu Dhabi as an interactant allowing us to pivot to comparisons with Chamonix and Vancouver.

We call for researchers to explore innovative research methodologies such as LDE not only during the pandemic, but beyond. Our experience with LDE as a research method suggests two key benefits. Firstly, LDEs can provide scholars with sense-making opportunities which can help them deal with changing situations. Such sense-making can come through not only taking observational field notes but observational field notes can be used as a sounding board with the other researcher(s) to deepen insights and focus. Sense-making can also come through the involvement of place and artifacts as interactants, such as discussions sparked by local images and news as well as academic articles. Furthermore, as Mulvihill and Swaminathan (2022) state, critical duo-ethnography can be used as a tool for "social justice research" with more than one voice shaping the understanding of the research phenomenon.

Secondly, LDEs involve a "peer exploratory process" (Le et al 2021, 2) whereby ethical clearance is not needed and time boundaries do not need to be identified at the onset. Accordingly, the researchers control how and when they are represented. This method can thus be used to reduce harm or disturbances from dynamic external factors and internalized subjective responses. By juxtaposing researchers' life chronicles over an open-ended period, there is also the possibility for a longitudinal study where a dataset spans many years, allowing for comparisons across a long time.

Finally, we also want to stress that close researcher relationships do not just happen, they need to be fostered and nurtured. When this is established, interactions can produce rich insights and a wealth of data. While this way of researching arose from the pandemic in our case, we have continued our research-based messaging past the perimeters of the COVID years and

expanded into post-COVID times. We hope other researchers might benefit from utilizing LDE as a method in the pandemic and post-pandemic years using "restructured relations" as the object of inquiry.

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SECTION II

Innovative pandemic methods

6

DISRUPTIONS AND INNOVATIONS IN SPORTS RESEARCH DURING THE COVID-19 PANDEMIC

Renzo Kerr-Cumbo, Valerie Visanich and Matthew Muscat-Inglott

Undoubtedly, the COVID-19 pandemic has been mostly represented in terms of profound disruptions, not only in everyday life in general but also in academic work and research, resulting in various adopted modes to accommodate the pandemic (Ryan et al 2024, this volume). Planned and ongoing research in the months prior to the pandemic, was suddenly interrupted by public measures implemented in response to the pandemic (Prommegger et al 2021, 100). In various instances, methodological shifts were required to existing ongoing studies, particularly to redesign methodological techniques for data collection due to added restrictions on conducting face-to-face research. In addition, the pandemic inspired researchers to focus on a range of new and distinctive research problems. Changes in human behavior due to pandemic-related shifts in cultural and physical conditions became in and of themselves worthy of study. This chapter tackles sport research trajectories during the pandemic by referring to restrictions of physical fieldwork and the adaption to and adoption of digital approaches to research in times of confinement and disruption.

Thus, *disruption* in the context of research can be understood twofold – both in terms of merely halting anything already ongoing dead in its tracks, or alternatively through the shifted landscape in which researchers identified and conceptualized alternative research problems worthy of investigating as well as placing the use of digital resources at the forefront. This is in line with what Najmah et al (2024 et al, this volume) discussed on the adaptation of new ways of working remotely.

In this chapter, we present our reflections with the experiences of academics working within the sports and exercise field as they relate to the said disruptions. The narratives bring together the experiences of participants in their capacities as lecturers, supervisors of undergraduate and postgraduate research, and

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professional researchers themselves forming part of our own international community of practice. A special focus is retained on the field of research in sports and exercise science. The interest is, more specifically, in the dynamic connectivity in these narratives, and how they reveal limitations, challenges, and opportunities in doing research in the field of sports and exercise science during the pandemic and beyond.

Specifically, we refer to conversations with six academics – four at our native technical college in Malta and another two academics with similar roles in Iceland and Turkey. To initiate this process of synthesizing understanding, we started our first communication by a questionnaire sent to our colleagues by email. Their replies have provided a first level understanding of the phenomenon that facilitated further discussion by means of online calls and face-to-face meetings. Throughout the process, we, namely Renzo and Matthew, as sports lecturers, also thoroughly discussed emerging issues and themes given our positionality as researchers, research tutors, and lecturers in sport and exercise for health, adding our own experiences to the analysis. Valerie, as a sociologist, provided a critical voice throughout, continuously prompting and probing for added depth. All participants brought in their experiences as thesis supervisors of undergraduate and postgraduate level sport and exercise science students and as active researchers on solo, national, and/or international research projects within the field of sports. These observations and experiences are in no way assumptions of a homogenous linear process between the three countries because we acknowledge the completely different particularities of these locations which does not result in a straightforward comparison of research experiences during the pandemic. Also, the sample size is far too small to allow for any form of generalizations to be made. However, the interest is to make sense of some of the disruptions in research and how researchers treated, innovated, and adapted to these shifts. The researchers in Iceland and Turkey were selected partly due to convenience in following a pre-COVID-19 collaborative study but also to obtain knowledge on different micro research experiences in multiple locations with no intention of presenting any form of generalization.

Although two of us are totally immersed in this scene, we stayed away from immediate conclusions, and applied an inductive approach during the synthesis of stories, both to participants as well as our own experiences. The types of methodological responses in the research process due to the pandemic, based on these conversations, can be classified in three main modes: The "wait and see" strategy; minor modifications process; and major modifications process. Moreover, the chapter also delves into the use of digital tools and sporadic virtual technologies using an iterative approach of going back and forth between data and literature review. Finally, the chapter addresses the importance of considering methodological legacy and the sustained use of online digital tools to the academic study of sports and exercise science.

Pre-pandemic sports research

Sport and exercise science undergraduate programs have been proliferating in the last few decades (Atkinson 2012, 124). This growth made research methodology specifically focusing on sport and exercise science very central and pertinent for the (1) teaching of research methodology units, (2) support given by faculties and their academics when it comes to supervising/tutoring dissertations, and (3) the cases when the same faculty members act as first-hand researchers themselves.

Traditionally, research in sport and exercise science gravitates towards quantitative analysis, or rather, it relies heavily on the analysis of empirical data. Areas like physiology, performance analysis, and biomechanics often require sports scientists to adopt methodological strategies that are influenced by the medical field, as well as the natural sciences. Popular textbooks on methodology for sport and physical activity researchers typically reflect such an orientation (see Thomas et al 2022) by focusing primarily on statistical analysis of experimental or observational field data. Other sub-disciplinary interests in sport research nevertheless facilitate widespread mixed use of both qualitative and quantitative approaches, in fields like psychology, sociology, pedagogy, health, economics, management, and others (Atkinson 2012, IX). Other methodology textbooks (see Gratton and Jones 2010), represent the qualitative-quantitative dichotomous conceptualization of research as is typically seen in the social sciences more broadly, albeit with often subtle and implied endorsement of the "gold standard" status of experimental research. By experimental research we mean, more specifically, the randomized controlled trial. Of course, such endorsement has not been without controversy in the social sciences methodological literature (Castillo and Wagner 2014; Thomas 2016).

In his book *Doing Qualitative Research in Sport and Physical Activity*, Bundon (2020) refers to the significance of qualitative methods for sports researchers who are interested in alternative approaches based on human experiences and inter-subjectivity. According to this dualistic methodological conception and stratification across qualitative and quantitative approaches, we can safely claim qualitative research has been the more prevalent in most of the departments comprising our community of practice in recent years, particularly at Bachelor's level. The style of research and prevailing methodologies in any given academic community are necessarily influenced by the preferences of faculty members in their capacities as research tutors/supervisors, or exemplars by virtue of their own published research styles.

In this sense, despite otherwise strong traditions for quantitative research in the sport and exercise sciences as a whole, before the pandemic, qualitative research has constituted the majority of research output in the departments included in our ensuing narratives. This was mainly due to the backgrounds of the particular participating faculty members who contributed their insights. This common trend in applying qualitative research, which often requires

interacting with the studied population in the form of interviews or observations, among other methods, did present an imperative challenge to the researchers during the COVID-19 pandemic. It was interesting to note, therefore, that as part of the plausible solutions to these challenges, the pandemic succeeded in disrupting our methodological status-quo. Qualitative research underwent a revamp in terms of the sources and theoretical frameworks underpinning it, while quantitative research grew in popularity and diversified in scope and statistical methodology.

Researchers who opted to retain clear-cut conventional methods in the traditional research paradigm and collect data in a face-to-face fashion (where human contact was not limited) found numerous challenges due to the imposed restrictions, limited access to participants, and fear, among others. Those opting to shift towards virtual approaches needed to be rather innovative to find ways of seeing and observing patterns of behavior using digital tools. In exploring the experiences of the participating research colleagues, more specifically, this chapter further outlines the role and function of online content analysis, with reference to the use of social media and video-sharing platforms related to various types of exercise and nutrition content, as important sources for data analysis in the absence of visual research methods due to confinements. It also explores how academics and university students demonstrated a tendency to engage in alternatives like performance and match analysis, particularly in football and basketball. It examines how academics moved towards, and simultaneously assisted their supervised undergraduate or postgraduate students to move towards, online content analysis in local-specific or international settings, to further understand tactical and/or technical trends, as well as other parameters mostly in the physiological, psychological, and pedagogical domains.

Methodological responses

The response of the research workforce to COVID-19 has generally been described as adaptable and resourceful (Jung et al 2021; Wyatt et al 2021). This typically refers, however, to responses in the form of new COVID-related research studies, and not necessarily to methodological adaptations or developments pertaining to non-COVID related studies. In both scenarios, we turn our attention primarily to methodology, to try and understand the effects of the pandemic on the way research was and is actually carried out according to study scope. Based on our analysis of reflective accounts on the shifts in research processes during the pandemic, the types of methodological responses can be conveniently classified in three main ways: (1) The "wait and see" strategy, (2) minor modifications strategy, and (3) major modifications strategy.

Methodological responses were characterized by those who, first, treated the pandemic as an extraordinary circumstance forcing severe delays to existing research activities. Many researchers, in this sense, opted to put projects on hold, and resist making changes for as long as possible, until circumstances forcibly

dictated otherwise. Admittedly, such sentiments must have by default been more common in the early days of the pandemic, but ultimately persisted long enough to constitute a definitively identifiable strategy in academic and research circles. Some researchers and supervisors preferred to wait and see how various disruptions panned out, even after restrictions began to increasingly embed themselves in most major aspects of everyday life. Exercising only slightly less caution, some were prepared to entertain minor modifications to existing projects in order to maintain output typically reasoning that slightly altered approaches, even if otherwise unacceptable, would in the end, be considered acceptable in light of extreme circumstance. Others took more drastic steps, maximizing opportunities to implement new systems in settings perhaps already in need of reform, and take COVID-19 more generally as an opportunity to learn, innovate, and grow.

Wait and see

One of our international partners reported that their experience throughout the worst phases of the pandemic mostly just involved delays, which caused students to run out of time and hence made it harder for them to produce effective work. In a good number of sports-related undergraduate dissertations in Malta, researchers in sport and exercise for health often collect data in schools. This was particularly problematic, given that COVID-19 imposed unprecedented challenges on educational systems worldwide, which were forced to transfer online almost overnight (Dhawan 2020). Many tutors and research supervisors initially assumed this to be a temporary fix, and advised students to wait for schools to re-open rather than seek out new methodologies or change their studies entirely. Following numerous delays, students were forced to revise their methods anyway, and ended up rushing their work. This resulted in research of severely diminished quality and a high degree of demotivation. Rather than accepting the need for fundamental changes in approach, institutions opting to wait and see made mostly administrative adaptations in the form of extensions, postponements, and sometimes waivers, resulting in little real long-term methodological changes. The increased stress on students naturally meant an increased risk of dropping out from programs of study altogether. Perhaps future research may shed some more light on dropout rates, specifically those occurring later throughout the course of study, where research represented a major proportion of the workload. To a certain degree, the wait and see strategy was a prominent feature in all the institutions in our community of practice, but in most cases, this was accompanied by more proactive and intriguing methodological changes.

Minor modifications strategy

A second level of response was characterized by initiating only minor reforms. Such responses were aimed at curtailing the influence of the pandemic with an

absolute minimum of changes, in either methodology or scope. John, a colleague who was supervising degree dissertations shared with us that:

> Students found it hard to think of alternative data collection methods in view of inability to carry out data collection as already envisaged in their proposal. At times it was hard to deviate from already established ethical proposals and in some cases, students would have benefited from extension to submission of their work (however these were not always granted).

So long as the study could go ahead with only slight modifications, students and faculty members following this approach ultimately experienced the least disruption of all, given that the "wait and see" approach mostly failed to pan out in light of continuing and often worsening restrictions. As one of our colleagues pointed out, every research project has its limitations, so the limitations arising during this period were not necessarily that much worse than the norm, and represented the kinds of challenges researchers routinely face, and sometimes even relish.

Among the studies still workable subject to minor reform were qualitative, interview-based studies. Face-to-face interviews had to be cancelled, but this became less of an issue the moment people started to familiarize themselves with the software and technology surrounding online meetings and lectures, "… through the use of tools such as Zoom, Google Meet, and Microsoft Teams" – similar to what Sánchez-García et al (2024) discussed in this volume. Shifting most aspects of everyday life online, more broadly, became less of an issue the longer restrictions persisted. The limitations of the online systems applied by academic institutions, however, quickly became apparent. One of our staff researchers involved in disability sport noted how transitions for special populations were anything but smooth, particularly in the case of participants with intellectual disabilities. It was difficult to establish a rapport and trust with such participants, which is needed to gain in-depth data. The limitations of online interviews and the loss of nonverbal forms of communication quickly became apparent. In the context of medical research, Tavazzi (2021) highlights that the switch to online video communication also constituted a move from a direct to indirect links to participants. Big tech was introduced as a medium in all such transactions. Big data, confidentiality, and the ownership of knowledge all come into play here.

Staff also pointed out that the almost total shift to online teaching and learning, lecturing, and research supervision was accompanied by impacts on the mental well-being of learners (Gauci et al 2022), parents, teachers (Kubwimana 2021), as well as athletes (Bezzina et al 2021). This is in line with what Rusi Jaspal and Glynis M. Breakwell (2024) examined, in chapter two in this volume, on the social psychological aspects of the pandemic and the increased health burden. Since student-athletes also faced major restrictions in the ability to practice their sport, associated compound mental effects and their impact on

research findings in that period are difficult to fully appreciate. In other words, the direct and indirect effects of COVID-related stress on research processes as well as outcomes, are necessarily complex, multifaceted, and exceedingly difficult to define or delimit.

Major modifications strategy

A third level of response resulted in relatively major reforms, and was mainly applied in two different ways, namely reactively or proactively. In the case of *reactive* major modifications, studies that became untenable and could not simply be put on hold, were overhauled. We refer here to those overhauled in terms of methodology and not scope. This approach engendered meaningful reflection on current and former research projects in terms of logistics and other practical concerns. In the sports department, in our native technical college in Malta, many research projects were immediately overhauled with major methodological reforms, due to fear of excess delays and a general scepticism about the pandemic being over any time soon. Some staff members saw this as an opportunity to improve on issues that had long plagued research efforts in the department.

Considering the issue of access in schools due to lengthy and overburdened ethical processes, as well as the shift to online teaching and learning, it became almost impossible for research in schools to materialize. One of the participating supervisors made it very clear that it was purposely decided early on for undergraduate researchers to immediately abandon any plans of collecting data in schools. Different channels would immediately need to be entertained for any study to go ahead. Supervisors and researchers were forced to be creative in their thinking about research methods, while attempting to retain the original scope of their studies. This is where access to online quantitative and qualitative data, such as online national statistical reports, online public datasets, search engine trends and metrics, approval ratings of media and social media content (quantitative), published manifestos, political speeches, policy documents, media and social media comments and posts (qualitative), among others, became attractive options allowing academics to explore different and often welcome refreshing alternatives to the usual surveys, interviews, and questionnaires that tend to dominate undergraduate research.

Survey research via online questionnaires initially predominated as an ideal solution for a while, however quickly became difficult as sampling spaces became saturated, particularly in the case of small countries. Members of populations of interest became overwhelmed by requests to fill out questionnaires, and this sentiment was shared not only by our colleagues in small states, but also our fellow researchers in the substantially larger research setting of Turkey. Saturation of the field with undergraduate researchers issuing questionnaire and requesting interviews had long been a concern in our own department among various members of staff, so we keenly took this as a legacy-building opportunity, to

make lasting changes that would serve us well not only during the pandemic period, but hopefully permanently. Together with the acknowledgement of the use of technology to adopt the same methodological design (similar to chapter three by Sánchez-García et al 2024 in this volume), our colleagues also discussed the way students, for instance, designed new studies applying alternative methodologies based on the use of technology like wearable sensors, trackers, and apps to be used by participants entirely remotely. Such resources had not previously been fully considered as valid data collection tools. In this sense, mastery of such technology by student researchers and their tutors appears set to promote more such studies in the near future, representing a clear example of lasting methodological progress.

Some colleagues in our native technical college in Malta were more proactive in their use of major modifications at the initial stages of research design. In such instances, both scope and methodological decisions were built entirely on the condition of no human contact. Addressing both the limitations imposed by COVID-19 restrictions, as well as aforementioned saturation issues, two of our colleagues opted to more comprehensively explore methods of performance analysis without the need to access participants or sports facilities/events. One such study was based on an in-depth statistical analysis of a census of goals scored during the Maltese BOV (Bank of Valletta) Premier League 2018/19 season, by analysing videos of all the goals scored in that season (Sciberras et al 2022). Another study was based on an analysis of all the games played by Manchester City with the use of specialized software for "lag-sequential analysis". This method facilitated a more nuanced tactical understanding of offensive phases by Manchester City during the UEFA Champions League 2019–2020 (Kerr-Cumbo 2022). A number of undergraduate sports students with a special interest in association football have since adopted lag-sequential analysis as their main research project. Another student applied logistic regression analysis to explain and predict successful offensive shots in basketball by analysing public videos of a census of games played by a prominent local Maltese basketball team.

Despite the three adaptive strategies outlined above, namely the (1) The "wait and see" strategy, (2) minor modifications strategy, and (3) major modifications strategy, some projects became simply untenable, and although sound in scope, were abandoned in favor of more workable alternatives. While some such studies may never be done, constituting clear examples of negative disruption in the traditional sense of the word, other observed shifts emerged from discussions with participants.

The increased use of digital tools

To the dismay of local sports and exercise professionals and practitioners, social distancing restrictions surrounding organized sports and exercise were among the last to be lifted in many countries, including those represented in this chapter. This brought considerable financial challenges especially for

persons working on short-term contracts and freelance, not only for persons engaged in sports but also for other fields including, for instance, the arts. Undoubtedly, work patterns in general were considerably interrupted as outlined elsewhere (see Visanich and Attard 2020; Visanich and Attard 2021).

Work for researchers to go into the field and take direct measurements of athlete behaviors and performances became simply impossible due to an almost total shutdown of both competitive and non-competitive sports at many levels. Together with the European Football Championship and the Olympic Games, many other leagues and sports events were postponed, and sometimes even cancelled (Evans et al 2020). Assembling groups of athletes outside organized sports clubs or events raised unique ethical challenges, not least due to the increased exposure to risk of infection such gatherings would have entailed, no matter how many protective measures were taken. "Unfortunately, I couldn't go to schools for my data collection … with regards to data collection, it was a bit of a struggle as everything had to be done online", explained Diane, one of our colleague participants who underlined that given additional restrictions on public gatherings, research with groups had not only ethical but also legal ramifications with the ever-present risk of hefty fines.

Many of the studies that were in any way dependent on groups and field measurements were not in a position to "wait and see". Considering their limitations with time and resources students doing their undergrad dissertation or academic researchers had to either apply major modifications and change altogether, or explore the possibility of "minor modifications" by collecting data through digital tools including but not limited to recorded video or voice calls via tools such as Microsoft Teams or Zoom. One research participant maintained:

> Traditional access to data collection was initially limited, for example initially, close to the outbreak, I had to cancel face to face interviews. However, this was soon addressed via the introduction of video-sharing e.g. Zoom/Teams, which actually, at least personally, aided the interview process by allowing access to some of the participants because it was easier to allocate time for interviews.
>
> *(John, Sports lecturer and researcher).*

While this was a tool used earlier on, during the COVID-19 period the use of such tools grew exponentially, and in fact, the tools were also improved drastically, which in itself is a legacy of the same period. In cases where these adaptations were not possible, studies were ultimately lost, since most undergraduate researchers are unlikely to engage with the considerable challenges of carrying out a separate, additional full research project again, unless explicitly required to by their program of study.

While these digital tools were an asset for many, they still proved to be challenging for others. One of our participants explained how she had to shift from focus groups to online interviews with participants with intellectual

disabilities. While this was the most plausible solution, which has in actual fact also brought in a number of additional benefits, such as "recording and transcribing to mention a few" the challenges were numerous as well. One of our colleague researchers shared that both herself "… and participants did not know each other, thus [they] found it harder to create a comfortable environment through online video calls" and hence made "communication and comprehension of questions" even harder. This researcher added that she "could not read participants' body language".

Participants outlined the essential role and function of digital content during the pandemic. Reference to the importance of analysing online content was accentuated, especially the use of social media and video-sharing platforms related to various types of sporting practice, exercise science, and nutrition content. This was particularly required as a source for data in the absence of physical fieldwork. One of us, whose main area of research is sports coaching and football analysis, has in fact immersed himself in looking for methods of match analysis that do not require visiting football pitches at all. This has proved to be very much possible with the available online databases and analysis software. The COVID-19 limitations did not only push this researcher to look into new methods of data collection and analysis, but also to explore a new research methodological approach. In fact, in order to apply sequential analysis on Manchester City's offensive phase, Kerr-Cumbo (2022) has obtained all the footage of the football matches from INSTAT, a sports performance analysis company which has a huge database of football matches. Furthermore, the researcher explored Soccer-Eye, a software that was developed by researchers from the University of Porto who were also willing to share the software for further research and development (Barreira et al 2013). Perhaps, this feeling of helping each other during the COVID-19 period was also extended to researchers giving each other additional support in various fields.

Digital tools were not only relevant for data collection. It became even more relevant and clear in this period that online content is data in itself. While this, again, was not a new methodological realization, it was further strengthened during the COVID-19 period. Following conversations with research participants, there was consistent reference to immersion in social media to observe, document, and analyze online content on discourse related to training and sports during the pandemic. Moreover, digital tools were used to collect data of league games in a local-specific or international setting, to further understand tactical and/or technical trends and other physiological parameters. Furthermore, social media itself is regarded as a thing in itself – a practical and significant symbolic representation of people's lives worthy of investigation. It is not a monolithic space, but rather, a democratic one inhabited by a large diversity of individuals. Its flexibility in terms of accessibility made this research technique a preferred tool during times of confinement. However, aside from the increased use of digital methodological tools, an understanding of other methodological responses of researchers during the pandemic is warranted.

Methodological adaptations

The feasibility of traditional methods of data collection and analysis was reduced drastically during the pandemic, especially, but not only, due to lockdowns and travel restrictions (Najmah et al 2024, this volume). The pandemic, or rather the limitations on face-to face interactions during fieldwork, presented students and academics with opportunities to diversify their research methods and resort to more online methods.

When asked about what the pandemic has taught us in particular regarding sports and exercise research, one of our participating colleagues told us to "innovate". In further explanation, a research academic from Turkey told us that during the pandemic we came to realize that "with the use of technology, we were able to see that it would be possible to conduct research in such situations".

Epidemiology, or the study of health states at population level, emerged as a crucial field at the height of the pandemic, influencing many of the policies and strategies that had a direct influence on the lives of people in most countries around the world. More specifically, the methods underpinning epidemiological and public health research gained some prominence in terms of their potential applicability specifically in sport and exercise. Due to the limited access to human participants because many sports activities were stopped and also because of COVID-19 restrictions, students were encouraged to engage with public secondary datasets like national statistical reports on health or population and social conditions, creating desired legacy in our native technical college in Malta directly attributable to pandemic disruptions.

This increased interest in the use of secondary data has, perhaps, been strengthened during the outbreak of the pandemic when data collection was very difficult, yet it is now part of the legacy left by the pandemic. One of our participating researchers explained how it was not only video calling and online forms, but also the use of technological tools such as "sensors attached to treadmills and bicycles" that were found useful in collecting data without having to directly intervene or meet the research participants. This has highlighted a whole new world of research that can be done. There is no doubt that the idea of looking into the use of such sensors, including heart rate monitors and GPSs that can be given to participants, is one way of doing things, yet we can also think "cheaper" and start looking deeper at the data that many have on their phones or smart watches. This can provide us with an even deeper insight into looking at exercise science from a socioeconomic perspective by getting into the homes and the lives of many individuals.

Another colleague explained how in Malta, the "comparison of simple ratios allowed students to hypothesise, for instance, about the rates of mortality from preventable causes in Malta in relation to the European average, against relative rates of, say, poverty or GDP (gross domestic product), to develop arguments about the relationship between wealth and public health outcomes". Using the simple but powerful methods and techniques from epidemiology, particularly

where public tabular data facilitated the construction of 2x2 contingency tables, students were able to infer relationships and test various hypotheses using basic odds ratios and associated confidence intervals.

Combining such methods with other online utilities like search engine keyword trends by location, provided opportunities for undergraduate researchers. Innovative research fields also included investigating changes in the popularity of search terms related to particular types of home exercise or eating habits over the lockdown periods. Views, likes, and subscriptions on social media and video-sharing platforms related to various types of exercise and nutrition content also presented interesting data for analysis. This increased interest in such data by sports and exercise scientists and researchers is opportune in addressing the important contextual reality of the national obesity epidemic in Malta, where an alarming obesity rate means three-quarters of men are overweight, according to the World Health Organization's *European Regional Obesity Report* (WHO 2022). Thus, the restrictions in collecting field data during the pandemic provided an opportunity for academics and students to more closely analyse national statistics on sports and exercise or lack of it.

What's more, many pre-pandemic local league games in various sports were available online, allowing students to collect data about physiological, tactical, as well as other parameters. Use of open source motion analysis software was also encouraged by supervisors to aid in interpreting movement patterns in video content.

An increase in basic meta-analyses, a quantitative "design used to systematically assess previous research studies to derive conclusions about that body of research" (Haidich, 2010, 29), was also reported by some of research participants. For instance, one undergraduate researcher compared the number of randomized controlled trials – trials "in which subjects are randomly assigned to one of two groups: one (the experimental group) receiving the intervention that is being tested, and the other (the comparison group or control) receiving an alternative (conventional) treatment" (Kendall 2003, 164) – showing improvements in the quality of life among persons with cancer undergoing exercise programs, that either included or omitted resistance training methods. Her meta-analysis concluded with a final overall effect, as well as the partitioned effects derived from studies falling into each of the two programming categories, finally differentiating the two according to whether the confidence intervals surrounding their associated r values overlapped.

Through the pandemic, Fetters and Molina-Azorin (2021) reported an increasing emphasis on mixed-methods approaches, use of large-scale public data mining, artificial intelligence, and computational approaches to research. They argue in favor of greater integration between different approaches to research, based on identification of qualitative themes with accompanying quantitative analyses. Indeed, for us, looking more closely at online data opened up yet more opportunities for original research using the qualitative approach. While the vast majority of qualitative research in our native technical college in

Malta had been based on interviews and focus groups up until that point, the pandemic provided students the opportunities to consider alternative non-physical methods including qualitatively analysing online written content in multiple formats, such as political speeches relating to sports development and performance, and important policy documents from government or sports associations/clubs.

Some students took to analysing video content for popular videos on given topics from a range of different theoretical perspectives. Given the popularity of content shared on online video-sharing platforms, it is surprising the shift towards increased analysis of such phenomena has not happened sooner. One undergraduate sports student became interested in the difference between quantity of views for online videos referencing particular peer-reviewed studies, compared with actual readership of the original journal articles themselves upon which such videos were based. The extreme discrepancy highlights a number of troubling issues surrounding public uptake of reliable evidence-based information, as well as public understanding of science and academia more generally.

Considering the limited access to participants during the COVID-19 period, a researcher participant who was also acting as a dissertations tutor, explained that during that period he allocated more focus to encouraging students to look at public social media debates and comments sections as interesting sources of data for qualitative analysis. The rise of user-generated content online means that the nature of discussion in society has simply evolved beyond traditional live group interactions in the community. One methodology lecturer reported a series of interesting class-based discussions on media and social media comments pertaining to relatively controversial topics like match-fixing, inclusion of transgender athletes, feminism in sports, doping, and others. Here too, discrepancies all too often arise, as discussions go off point, contradictions abound, and tempers flare. Nevertheless, if online discussions generate public engagement, then researchers need to be operating in the particular "field" that matters the most, where the most important and relevant data can be collected, and in the format that many indeed appear more comfortable using to share their personal views and subjective truths.

Conclusion

This chapter has endeavored to make sense of some of the disruptions in research within the sports and exercise field. Following online discussions with academics in sports research in three different research institutions, the main consequences of, and reactions and responses to the COVID-19 pandemic from the researchers' viewpoint were discussed. Such experiences were characterized more by their similarities rather than differences, as practices were adjusted to meet the rapidly changeable conditions in effect between early 2020 and most of the subsequent two academic years.

Undoubtedly, the pandemic resulted in a sudden response to redivert physical fieldwork by adopting and adapting to other research methodologies. Primarily, the chapter explored the initial responses of researchers – that of either "wait and see", or of enacting either minor or major modifications to the research methodology. Despite the restrictions of the pandemic and the negative consequences of shifting to online resources and methodologies, this chapter has given an outline from the perspectives within our community of practice, of some of the most innovative and iterative approaches adopted as a response to the pandemic, as well as use of sporadic virtual technologies. Inspired by what could be conceptualized as a grounded theory approach, researchers became more prone to choose methods that allowed them to go back and forth between data and literature review. Following an overview of some of the prominent shifts in research, the chapter noted how funding opportunities fostered both positive and negative outcomes in sport and exercise research in addition to other fields more broadly. In an attempt to avoid rushed studies of questionable long-term scope outside the immediate context forced by the pandemic, we have aspired to promote methodological legacy and lasting improvements to the scope and quality of sport and exercise research at all levels.

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7

EQUITABLE COLLABORATIONS

Modelling innovative public health research during a pandemic

Najmah, Sharyn Graham Davies, Kusnan, Sari Andajani and Tom Graham Davies

The COVID-19 pandemic forced a radical rethink around approaches to conducting research. No longer could teams of researchers meet in-person, travel to the field, or interact physically with participants. As Long et al (2023) show, the COVID-19 pandemic was a collective critical event that called into question established ways of imagining what research looks like and how it should be conducted. Many researchers took these changes in their stride, showing creative ingenuity to turn a challenge into an opportunity. Qualitative researchers were awakened to the value of online surveys, which could be quickly disseminated and returned with rich and verbose text (Dekert et al 2021). COVID diaries, pandemic comics, and citizen-science projects all created opportunities for the collection and analysis of rich data in ways not hitherto undertaken (Gailloux et al 2022).

Changes in approaches to research also saw an opening up of international collaborations (Pradhan et al 2021). Once, academics based at wealthy Western universities travelled to field sites in lower income countries, collected data, and then often returned to their home university to publish outputs with little inclusion or acknowledgement of local partners. During the height of the pandemic, lockdowns and travel restrictions meant this way of doing research was impossible, yet research was still urgent. What emerged in this gap was in many ways a fairer form of research, where international partners had, by necessity, to work more equitably together (Norton et al 2020).

Research engagement with participants also changed during the height of the COVID-19 pandemic (Holroyd et al 2022). Qualitative researchers could no longer spend time in-person building rapport. Rather, researcher-participant relationships had to be developed at a distance, either through physical distancing or, more often, through virtual points of connection such as via social media, Zoom, and WhatsApp (Envuladu et al 2022; Najmah and Davies 2020).

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What additionally emerged in this space was an urgent investment by people in the impact of COVID-19 research (Mouter et al 2021). As people saw loved ones die before their eyes, communities demanded research that could halt the spread of COVID-19. But at the same time that people were demanding scientific research, suspicion of scientists grew (Hamilton and Safford 2021). Suspicion around governments also increased, particularly in countries such as Indonesia where there was already a low rate of trust in the government (Wirawan, et al 2021). Indeed, in Indonesia, mainstream media filled with articles spreading vaccine misinformation (Ningtyas 2021), fake news (Muzykant et al 2021), and inciting blame against governments and scientists for the uncontrolled spread of infection (Idris et al 2020). Many academics tried to step up here and provide governments with research-led data, and crucially provide citizens with easily digestible COVID-19 health information, a role that academics demonstrably assumed in countries such as New Zealand (Lesley 2020).

In this chapter, we explore three methodological innovations. First, we examine how research methods were adapted to take advantage of new ways of working remotely. Second, we investigate how the COVID-19 pandemic opened opportunities for working equitably across international space. Third, we explore how research teams were able to develop trust and rapport with participants in COVID safe ways. The importance of establishing trust with participants was crucial not just for collecting data but also to enable us as researchers to act as liaisons between citizens and government, in both feeding research findings to governments to impact policy, and also in disseminating findings in avenues accessible to people.

While we draw on international work on COVID-19 to develop our points, we base this chapter explicitly on a research collaboration we developed at the start of the COVID-19 pandemic that focused on Indonesia. Indonesia has been hard hit by COVID-19. As of March 2023, there had been almost 7 million recorded cases of COVID-19 and 161,000 recorded deaths in the country (Worldmeter 2023). This number of cases and deaths is likely to be vastly underreported though (Mathieu et al 2020). As second author, Sharyn Graham Davies, found out from first-hand experience of contracting COVID-19 in Indonesia in November 2022, it is difficult and expensive to get a COVID-19 Polymerase Chain Reaction (PCR) test. For those wealthy enough, a mobile test unit can come to a person's residence, deliver the test, and text the results to the patient's phone within 24 hours. But this costs around US$40, a high rate when compared to the average weekly salary which is less than US$200 (CEIC 2023). People can go personally to a clinic and get tested for around half this amount but there are transport costs and long wait times involved. Further, people who are sick with COVID-19 do not want to travel, and those who are unsure of their status do not want to risk catching COVID-19 at a testing station.

As a result of these barriers, combined with the penalties applied if you test positive (e.g., many places of employment require a clear PCR test before returning to work which means additional costly testing), it is likely that a

substantial number of people in Indonesia do not get a PCR test, nor declare a positive Rapid Antigen Test. Added to these barriers is the fact that Indonesia's population of 274 million people is spread across 6,000 islands, most of which do not have the healthcare facilities needed to test for COVID-19 (Sucahya 2020).

Evidence of the underreporting of Indonesian cases and deaths will likely become apparent in statistics around excess deaths, with anecdotal evidence already suggesting that COVID-19 deaths are being reported erroneously as deaths from tuberculosis, influenza, or asthma, as was suggested informally to Sharyn Graham Davies during her November 2022 trip to Indonesia. Sharyn was told that this misreporting occurs because of the shame for the family of having a member die from COVID-19, and the added difficulty and expense of related activities once COVID-19 has been confirmed as the cause of death (see also Najmah and Davies 2021). For instance, Muslims must be buried as quickly as possible and protocols around a COVID-19 death can delay a burial, and an autopsy can add significant expense (Gabay and Tarabeih 2022). Indeed, Najmah's relative was only allowed to bury his father in a public graveyard by signing a letter agreeing not to disclose that his father passed away in the hospital after being diagnosed with COVID-19. While Indonesia is missing from The Economist (2023) list tracking COVID-19 excess deaths, it is likely that once data is collated, Indonesia will feature highly.

The enormity of the COVID-19 problem in Indonesia required rapid research to understand how communities were responding to government health mandates, and to inform governments what people needed to help keep themselves safe. Najmah, who is based at the University of Sriwijaya in Indonesia, felt compelled to collect data about people's experiences in order to urgently inform government policy, and to also produce health material that was understandable by local people, including by publishing material in local languages. Najmah gathered around her a group of scholars from the University of Sriwijaya and then reached out to her former PhD supervisors Sharyn Graham Davies and Sari Andajani, and other colleagues including Tom Graham Davies, Kusnan, Fenty Aprina, Maulidinda, and Zico to collaborate on a large research project – it is worth noting here for clarity that many Indonesians only have one name. In the remainder of this chapter, we examine how this team of researchers, spread across Indonesia, Australia, and New Zealand, were able to produce research data that helped inform government policy and crucially provided people in Indonesia with accessible health research findings (see also Abaunza 2024, this volume).

Adapting research methods

In the early stages of the pandemic the research team needed to think quickly about how to adapt research methods to ensure production of quality outputs. The team has expertise in both qualitative and quantitative research methods and a decision was made to draw on our strengths and adapt these methods to

be compliant with COVID-19 health mandates. While traditional ethnography often involves living in close quarters with participants to get an in-depth understanding of their everyday lives, we dissected ethnography to its constituent parts and adapted those individual methods (see also Hopkyns and van den Hoven 2014, this volume). For instance, instead of long-term participant observation, a mainstay of ethnography, when strict lockdown protocols abated somewhat, we conducted *go-along interviews*. These interviews involved the researcher physically walking along with the participant outside and keeping a two-meter distance. In this way, the pair could limit the risk of COVID-19 transmission while still discussing the research topic in a relaxed way (see also Calvo et al 2024, this volume). With the consent of the participant, the interview was recorded to allow the researcher to later transcribe the audio recording.

Given the urgency of feeding people's needs into government policy, our research drew on the paradigm of *participatory action research*. Participatory action research is a collaborative research approach that involves active participation from the community or stakeholders who are affected by the research. This approach recognizes that the people who are most affected by an issue or problem are the best experts on their own experiences and can contribute valuable insights and knowledge to the research process. Participatory action research typically involves a cyclical process of reflection, action, and analysis. The community or stakeholders work with researchers to identify a research question, collect data, and analyze the findings. The goal of participatory action research is to produce knowledge and action that is useful and relevant to the community or stakeholders involved (Baum et al 2006).

While participatory action research is often conducted when physically meeting with people, we adapted this approach to ensure it was COVID safe. For instance, we used WhatsApp and Facebook Messenger to create a community where people could share their views. We also used these applications to provide messages to people that would help them better understand health protocols and the very real benefit of getting vaccinated. For instance, there were high levels of COVID-19 vaccine hesitancy and even COVID-19 denial amongst communities in Indonesia (Najmah and Davies 2021). As Najmah and the team had already created a sense of trust with the research participants, we were able to use WhatsApp and Facebook Messenger to both collect information about why people denied the existence of COVID-19, and also share information to help communities understand the risk of COVID-19 and the benefit of vaccination. The team then worked together with communities to help keep everyone as safe as possible (Najmah and Davies 2020).

A further method the team adapted was a *mixed method approach*. We were able to do a rapid analysis of government statements on COVID-19 posted online, analyze secondary data that was officially released by health departments, and conduct online interviews with healthcare workers to develop both a predictive model of COVID-19 in Indonesia, and a qualitative understanding of vaccine hesitancy and COVID-19 denial (Najmah, Davies, and Yeni 2020).

While the secondary data analysis was not a new method inspired by COVID-19 restrictions, inviting healthcare workers to do interviews online, and have them accept, was an important development in producing rapid research outputs.

A final method we adapted was used when we conducted research with a particularly vulnerable group of people, pregnant women living with HIV, who needed to seek treatment during the height of the COVID-19 pandemic. The method we adapted was *visual participatory methods*. Visual participatory methods are a set of techniques and tools that use visual media to engage people in collaborative research, planning, and decision-making processes. These methods involve the use of various types of visual aids such as maps, diagrams, photographs, videos, drawings, and other visual media to facilitate communication and engagement. Visual participatory methods aim to create a participatory environment where everyone involved in a project, program, or initiative can express their ideas and opinions, and actively engage in the process of decision-making. By using visual media, visual participatory methods enable participants to express their views and experiences in a more tangible and accessible way, which can be particularly useful in cross-cultural settings or when dealing with complex and abstract concepts. Some examples of visual participatory methods include community mapping, photo-voice, and participatory video. The use of visual participatory methods provides a method for stakeholders to collaborate and share ideas in a creative and meaningful way (Lorenz and Kolb 2009; Mitchell and Sommer 2020).

In our study, women living with HIV were engaged in creating evidence about their health and well-being during the pandemic, and in co-developing modes of disseminating knowledge produced. As a specific example, the team, including the women participants, wanted to understand the stigma associated with both HIV and COVID-19, and so we collectively developed poems, song lyrics, and mind maps. Additionally, eight videos were collaboratively produced, and with the women's consent were uploaded onto YouTube to provide support for other women and so they were available to policy makers (Najmah, Kusnan, T. G. Davies, and S. G. Davies 2023). It is important to note that no identifying features of the women are included in the films and to ensure this, the women created puppets that stand in lieu of their faces (Najmah, Kusnan, T. G. Davies, and S. G. Davies 2023). Visual participatory methods proved to be especially valuable in enabling researchers and participants to connect during times of mandated physical distancing (Webb and Bedi 2021).

Opportunities for working equitably across international space

Research outputs are dominated by Western universities and resulting outputs have traditionally exploited the labor and resources of scholars in lower income countries (MacLeod and Urquiola 2021). But when COVID-19 hit, academic movements were reduced and other ways of working had to be established. Western-based academics researching less wealthy nations had to rely on others to

source participants, collect data, and provide the analytical context. Co-authorship became something that academics in less wealthy countries could now have more power in demanding. Structural changes too have made it easier for non-Western academics to claim authorship. Proactively, some leading universities have weighted co-authored articles as highly as sole-authored ones. For instance, Monash University, where Sharyn Graham Davies is based, demands academics meet annual publication targets but it no longer matters whether these publications are sole-authored or multi-authored. As such, the incentive for academics to publish on their own is reduced. But this may remain an exception rather than the rule as other universities continue to privilege sole-authorship and co-authorship can jeopardize an academic's promotion chances (Lanterman and Blithe 2019, Tilche and Astuti 2020). Research approval boards are also contributing to a changing research scene. For instance, Indonesia's research permit authorization body, the National Research and Innovation Agency, has now mandated that foreign researchers pledge to publish all outputs with Indonesian co-authors attributed (BRIN 2023).

Clear evidence has emerged of research teams able to harness technological developments to push for equitable international collaborations. Nick Long et al (2023) write of how they were able to pull together a research team with people based in four different time zones. Most of this team had never met before and so without the affordances made possible through COVID-19 such a team likely would not have developed. This research experiment also showed what can be achieved with little funding. Without the need to pay for travel, accommodation, and room hire, Long's team needed only a device and internet connection to share COVID-19 responses in their respective countries with each other. This collaboration resulted in outputs that influenced policy in the United Kingdom, the Netherlands, Ireland and New Zealand, and explored the experiences of Indonesians abroad (Martin-Anatias et al 2021).

COVID-19 also inspired new ways of writing. While academics had long co-written pieces while physically apart from each other, with draft versions being emailed back and forth, the uptake of virtual meetings spaces such as Zoom, and platforms such as Google Docs, allowed teams to work together simultaneously but apart (Aikman et al 2023; Long et al 2023). Different time zones could also work in a team's favour to allow them to meet tight deadlines; as one researcher finished for the day, another awoke to start work.

According to Zaman et al (2020), a long-term commitment to the research partnership involves building and investing in research capacity for the future – such as training local researchers and research assistants, including university students and field workers (such as health workers), in order to broaden their skill base and improve future opportunities (760). Based on the experience of Envuladu et al (2022), who were part of the African Translational Research Group (ATRG), research collaboration with a multidisciplinary international and local team can help the group maintain productivity, contribute to career progression and the academic promotion of research members, and provide a

space for members to learn about effective teamwork, communication, and the online coordination of a research collective.

In terms of our research team, we found that these new COVID-19-related restrictions and technological developments propelled a more equitable way of working. For instance, being on the ground meant Indonesian researchers could collect primary data and provide the subtle nuance needed to produce contextually rich articles. Researchers for whom English was their native language could then ensure articles were written and argued with the precision needed for journal acceptance in an incredibly competitive international publishing world. Taking advantage of respective strengths, and the new flexible research arrangements established during COVID-19, also provided space for early career researchers to receive mentoring and have their name included on outputs. We also drew on our interdisciplinary strengths, including qualitative and quantitative skill-sets, to add depth to our research design. Collective writing from these diverse backgrounds added depth to our outputs.

After reflection amongst our research team, members noted they had grown to appreciate the importance of academic writing and the additional insights experts from different academic backgrounds could provide. The team also appreciated the value of creating equal opportunities to be first author, and the importance of ensuring roles such as building trust among participants. The team also reflected on the importance of self-analysis, and developing an awareness of everyone's position vis-à-vis the research project. Additionally, the team recognized acutely that the knowledge and experiences participants brought to the research were invaluable and that they were the "real knowers" and experts in their life contexts (Lykes and Coquillon 2007).

Developing trust and rapport with participants

One of the challenges of doing research has always been developing trust and rapport with participants (Lafferty 2023). Ethnographers, for instance, typically spend a long time in the field to develop relationships with people but this was not possible during COVID-19 social restrictions. New ways of developing trust and rapport thus had to be developed. Building trust and recognizing the respective strengths of research collaborators were essential elements of the process and of particular importance to developing equitable partnerships (Envuladu et al 2022). For our research project, the Indonesia-based team spent significant time cultivating an online community of participants, developing virtual platforms for engagement and discussion. The two platforms we most regularly used were WhatsApp and Facebook Messenger.

Co-creation is a collaborative innovation where ideas are shared and improved together rather than by a single researcher (Pater and Veenhoff 2021). This approach to research can include the adoption of open-ended research goals, a willingness to adapt to unpredictable and continually changing circumstances, and a commitment to adhering to participants' and co-researchers' preferences (Gailloux, et al 2022).

Collaborative co-creation research also involves empowering participants, in our case women, to be co-researchers and to carry out some aspects of complex tasks such as data collection and analysis. While the bulk of our team's research activities were conducted virtually between 2020 and 2022, a critical aspect that emerged was the need to work with members of the large-scale collaborative research team in Najmah's neighborhood. Najmah led online and in-person discussions with women to develop mutual research foci. These discussions, and the intimate involvement of women in the research design and process, resulted in women feeling empowered to be critical elements of the larger research project. A key aim of this groundwork was to establish trust and rapport with women to ensure the success of the endeavour we called Penyuluhan Keliling Anak (Children's Mobile Counselling Service).

Penyuluhan Keliling Anak was a virtual community that was developed to raise children's awareness of COVID-19 and how to limit its spread. When COVID-19 restrictions were eased, the Penyuluhan Keliling Anak became a mobile community that visited schools and community centers. Najmah and the Indonesia-based team gathered a collective of community volunteers committed to raising consciousness about the severity of COVID-19 and disseminating information about how to help prevent infection. This community allowed researchers and participants to share their concerns and worries in a physically and emotionally safe space. Penyuluhan Keliling Anak took advantage of the fact that COVID-19 had shifted the world so profoundly that the expertise of researcher and participant often collapsed with the participant being the expert.

The Penyuluhan Keliling Anak community enabled people to see the respective worries of the researcher and the participant and this helped to break down traditional power differentials. The team then became a site to provide support to each other as all members were going through an unprecedented experience. Penyuluhan Keliling Anak developed to also become a space where academics could talk about the guilt they felt trying to juggle family and work commitments, as outlined by Lobo (2015). It also became a space where researchers and participants could reflect on the extra burden that COVID-19 placed on women, as Walters et al (2021) reveal. The flexibility of these new COVID-19 research protocols also helped key researchers manage competing responsibilities, including Najmah who had to juggle both a demanding academic career alongside care for her three young children.

In addition to the challenge of virtually creating trust and rapport with research participants was the fact that during the height of the COVID-19 pandemic, people in Indonesia developed high rates of dissatisfaction with government officials. For many in Indonesia, the government could not be trusted to implement effective health protocols. Consequently, researchers and universities had to work extra hard to obtain society's trust and support in order for their recommendations regarding health and safety vis-à-vis COVID-19 public health to be taken seriously (Algan et al 2021). It quickly became well established that pandemic-related anxiety and perceptions of health threats were associated with a

lower level of generalized distrust by ordinary Indonesians (Thoresen et al 2021). The successful implementation of public health policies and their supporting research required a high degree of public trust in institutions (Mihelj et al 2022). Given the level of public distrust, and being a research team with qualitative and quantitative research expertise, we proposed a public health research model that placed self-disclosure, openness, and participant methodological co-creation at its core.

The particular research collaboration we are discussing here resulted in 16 publications between 2020 and 2023. While we focused on academic, peer-reviewed outputs, we also recognized the importance of ensuring our research was accessible to communities and policy makers. Further, as we needed to get our research published as quickly as possible to ensure timely impact, we did not always have the option of peer-reviewed outputs which require long time-frames for revisions and final approval. There was also the added difficulty of ensuring that our scholarly work was not behind a pay-wall, which would have meant that unless readers had access to a university or the significant funds needed to pay for the free access version, they could not be read.

In Indonesia, distrust in the government is frequently high, and this was particularly the case during the early stages of the COVID-19 pandemic. Consequently, university-level research became critical to obtaining support amongst citizens for measures needed to protect public health. The Indonesian government was rightly criticized for its lacklustre response to COVID-19. Headlines accused the Indonesian government of "Denial of COVID-19" (Lindsey and Mann 2020), "Little transparency in COVID-19 outbreaks" (Human Rights Watch 2020), and suggested "Indonesia is a new COVID-19 epicenter" (Combs 2021). In this gap, university researchers came to be trusted members of the elite who people could trust regarding how to keep themselves safe during the COVID-19 pandemic.

Conclusion

Google Scholar reports more than 5 million articles with COVID-19 appearing in the title as of April 2023. This extraordinary production of knowledge in less than four years signifies both the dramatic impact COVID-19 has had on the world and also the success with which researchers across the world have been able to adapt to the challenges lockdowns and travel restrictions have placed on our ability to conduct research in traditional ways. This chapter has tried to showcase four elements where our research team adapted to the challenges of conducting international and interdisciplinary research on public healthcare (See Appendix 1 for a list of outputs).

We adapted research methods to take advantage of new innovations. We sought to develop an equitable way of collaborating virtually that drew on our respective strengths. For instance, the Indonesia-based team had most ready access to participants and data, and the language ability needed to analyze

government documents and social media posts. The Australia- and New Zealand-based team could draw on their strengths of data analysis skills and ability to write with a level of English proficiency demanded by publication outlets. The team worked to develop trust and rapport amongst participants in COVID safe ways by using technology-based tools such as Zoom, WhatsApp and Facebook Messenger, and when protocols allowed go-along interviews could be conducted in-person. Our team additionally worked to ensure that our research reached and benefited those whose stories we collected and shared. We hope that some of our experiences might be useful and of interest to others.

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APPENDIX 1: OUR PUBLICATIONS AND VARIATION OF METHODS USED

TABLE A.1

Publications	*Variation of methods/methodology*
1. COVID-19 denial in Indonesia, an article (Najmah and Davies 2021) 2. "Believe it or not, it's Covid-19": Family perceptions of Covid-19 in Palembang, Indonesia, a journal article (Najmah, Davies, Andajani et al 2021) 3. What's behind vaccine hesitancy in Indonesia?, an article (Davies and Najmah 2021) 4. From Covid-19 vaccine hesitancy to vaccine acceptance in South Sumatra, Indonesia, an article (Najmah, Kusnan, and Davies 2023)	• Internet search: governments statements in online news • Go-along interviews of 30 participants (12 males and 18 females) • Online interviews of health workers and photo elicitation
5. "It's better to treat a COVID patient than a HIV patient": Using feminist participatory research to assess women's challenges to access HIV care in Indonesia during the COVID-19 pandemic, a journal article (Najmah, Davies, Kusnan, and Davies 2021) 6. Disclosing one's HIV status during Indonesia's COVID-19 pandemic: Challenges faced by mothers, a book chapter in *COVID-19: Surviving a Pandemic* (Najmah, Kusnan, Davies, and Davies 2023) 7. *HIV: Perception, Resilience and Prevention*, a book (Najmah, Maulidinda, Zico, and Davies 2023) 8. Endless stigma of HIV and COVID-19, an article (Najmah, Kusnan, and Davies 2021)	• Online interviews of ten health workers • Online interviews and go-along interviews with 20 HIV-positive mothers and 20 women who were pregnant or had been pregnant during the COVID-19 pandemic • Virtual or face-to-face focus group discussion with mothers and HIV-positive mothers • Participatory visual methods by developing videos, poems, song lyrics, mind-maps, etc.

Publications	*Variation of methods/methodology*
9. Predictive modelling, empowering women, and COVID-19 in South Sumatra, Indonesia, a journal article (Najmah, Davies, and Yeni, 2020) 10. Descriptive epidemiology of COVID-19 in Palembang, Indonesia, a journal article (Najmah et al, 2022) 11. Working together: Exploring grass-roots initiatives to mitigate COVID-19 in Indonesia, an article (Najmah and Davies 2020)	• Secondary data analysis of COVID-19 from health office of Palembang • Collaborative research with lecturers, university students, and health policy makers from health office of Palembang
12. From drawings to puppet shows: Creating a collective space for HIV-positive women, a proceeding article (Najmah, Andajani, and Davies 2020a) 13. Perceptions of and barriers to HIV testing of women in Indonesia, a journal article (Najmah, Andajani, and Davies 2020b) 14. Im/moral healthcare: HIV and universal health coverage in Indonesia, a journal article (Davies and Najmah 2020) 15. Factors influencing HIV knowledge among women of childbearing age in South Sumatra, Indonesia (Najmah et al 2020) 16. *I, my Family and My Social Life: An Endless Struggle Of Transgender in Palembang*, a book (Najmah, Dika, Hasanah et al 2023)	• HIV-positive women, health workers, and NGO workers • Female police • Secondary data analysis of HIV • A literature review • Key population including transgender people, gay men, female sex workers, and men having sex with men

8

INTERVIEWS THAT HEAL

Situated resilience and the adaptation of qualitative interviewing during lockdowns

Kerman Calvo, Ester Bejarano and Ignacio de Loyola González-Salgado

In this chapter we draw on a recent research project on music-making from balconies in Spain during lockdowns in 2020 (Calvo and Bejarano 2020a; 2022) to discuss the possibilities and limitations of qualitative interviewing during the COVID-19 pandemic. While the COVID-19 pandemic offers unique opportunities to study the multiple experiences of people during health crises (Russo 2024, this volume; Roy and Uekusa 2020; Rahman et al 2021), it also imposes grave constraints associated with mandatory physical distancing. Our goal was to understand the motivations of the many professional and amateur musicians who played musical instruments from the balconies and windows in a ritualistic way from March to May 2020, i.e., during the most uncertain weeks of the first wave of the pandemic. To this purpose, 38 interviews were run over the phone and six over video link. We reflect on standard ideas about interviewing to discuss the possibility of paradigmatic variations when it comes to collecting qualitative data using interviews during the COVID-19 pandemic. Much had to change in terms of research design, logistics, and use of data to cope with the uncertainty associated with a very new type of crisis, and the overwhelming set of emotions that governed the daily life of both respondents and researchers at that time.

Qualitative social science is based on in-person relationships between researchers and participants (Denzin and Lincoln 2017). Mandatory lockdowns and generalized restrictions on social interaction accelerated the use of technology-mediated techniques of qualitative data collection, which had already been employed to great success in digital ethnographic research (Russo 2024, this volume; Murthy 2013), or in geographically separated contexts (Glassmeyer and Dibbs 2012), just to mention a few examples. Lockdowns, however, forced a frantic logistical transformation that came with the requirement of physical distancing: from in-person qualitative data collection methods to remote ones such as videoconference platforms (e.g., Zoom, Google Meet, Skype), telephone

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calls, emails, messaging platforms (e.g., Whatsapp, Facebook Messenger), and social media (e.g., Twitter, Facebook) (Adom et al 2020; Hall et al 2021; Jones and Keynes 2020; Roberts et al 2021; Teti et al 2020).

We claim here, however, that operational transformations are not the end of the story. As Ryan et al (Ryan et al 2024, this volume) argue, the pandemic "has raised significant ethical challenges for social science research". The pandemic invites a redefinition of the epistemological, theoretical, and ethical underpinning of qualitative research. To this purpose, we make a call for practices of qualitative data collection that build on the impacts of the pandemic to develop working modes that are both ethically *and* emotionally responsible. We think that the concept of *situated resilience* might capture this invitation (Tschakert and Tuana 2013). Resilience is a concept that draws on psychology to address individual and societal responses that attempt to recuperate life before a crisis. Resilience is situated when the ethics and goals of those driving response actions are taken into account; as we propose here, in designing an interview-based qualitative project inspired by the principles of situated resilience, we acknowledge not only the capacity of research activities and outputs to promote resilience in respondents and researchers alike, but also the paramount personal, financial, ideological influences of the pandemic context in both researchers and targeted populations, influences that in turn will shape operational and theoretical decisions. We designed our project about music-making with a three-fold goal: in the first place, to contribute to the visibility and recognition of the daily practice of music-making; in the second place, to write a piece of academic work in the social sciences that is relevant both in scientific and social terms; lastly, but by no means less relevant, to contribute to our own self-acceptance as professionals with a valid and necessary skills set. When a growing number of voices started discussing, during the first wave of the pandemic, the differences between necessary and unnecessary forms of expert knowledge, we endeavored to conduct a research project in the social sciences that could contribute to the defense of these disciplines as valid and useful.

This chapter is organized as follows. In the first section we present the opportunities and the limitations imposed on qualitative researchers by the current pandemic context. In the second section we briefly introduce our research on music-making in Spain during lockdowns. Then in the third section we begin discussing the operational alterations caused by the pandemic in terms of the design of interviews. We continue in the fourth section where we pay attention to the style of interviewing. In the fifth section we consider some choices in relation to intimacy and theoretical saturation. We summarize the main ideas of the chapter in the concluding and final section.

The COVID-19 pandemic as a driver of changes in conducting traditional in-person qualitative data collection

The COVID-19 pandemic has imposed unprecedented, and in some cases strenuous, restrictions on social interaction that have affected all aspects of individual

and collective lives. Its high transmissibility has forced public authorities to implement preventive health measures such as stay-at-home orders, restriction of movements between different territories, physical distancing, and lockdowns (Moghadas et al 2020; Smith and Cleland 2020). In response to the effects of the COVID-19 pandemic, most Western societies have shifted towards telehealth and online working and education (Haque 2021; Vlachopoulos 2020). This has been acknowledged to represent a force for change of gigantic proportions, with long lasting consequences in all walks of life. A growing body of literature has been discussing the experiences with qualitative research during the COVID-19 pandemic (Hernán-García et al 2021; Rania et al 2021; Reñosa et al 2021; Tremblay et al 2021). This has been particularly notorious in the fields of health, psychosocial sciences, and education (Ryan 2023).

The consequences of the mandatory move towards remote modes of communication appear to be mixed, the more so if we acknowledge that standard definitions about *quality of data* stand often in contradiction with the goal to guarantee the safest possible environments for participants. Considering the latter, remote methods of data collection offer flexibility to interviewees in matters of time and space (Burke and Patching 2021; Khan and MacEachen 2022). Russo (2024, this volume) argues that remote research methods led to a "conscious abandonment of some power of the part of the interviewer". These methods generally provide participants with new choices in terms of space (e.g., home, street, public transportation) and time (Tremblay et al 2021). In remote qualitative data collection methods, participants can withdraw from the data collection process at any time. They even have the opportunity of not showing up at the scheduled time more easily than in in-person qualitative data collection and to turn off their microphones, cameras, and devices and disconnect from the platform where the interview is being held (Dodds and Hess 2020). Archibald et al (2019) show that the technical difficulties of remote qualitative data collection methods can contribute to building rapport through collaborative problem-solving when facing connectivity problems and audio and video failures. Pilbeam et al (2022) report that online interviews were perceived by interviewees as safe spaces to process experiences and reflect on sensitive topics. During lockdowns, however, participants can be trapped in unsafe spaces (Khan and MacEachen 2022; Marhefka et al 2020). It is easier to attend the calls by researchers if you are at home all day long; at the same time, research conducted this way can be affected by working additional hours, experiencing a lack of privacy, the burdens of childcaring, or different forms of a digital gap (Burke and Patching 2021; Myers et al 2020; Roberts et al 2021; Watson and Lupton 2022). While communication can build on the flexibility and versatility of electronic communication, the depth and quality of it can suffer from the power imbalances associated with physical distance.

It is apparent that new safety and relevance protocols need to be put in place by researchers that seek to navigate the unchartered waters of this pandemic. Researchers willing to either start or adapt their qualitative research to

COVID-19 times should address the questions of safety of space and time availability, possibly designing contingency measures (Rahman et al 2021). Researchers need to engage in a serious reflexive discussion about how necessary their research is in a context of widespread suffering and unrest (Pilbeam et al 2022; Vindrola-Padros et al 2020). Is the research useful and necessary? And for whom? In truth, this is not only a debate about how to meet ethically virtuous standards: a defining element of research during COVID-19 pandemic should be the novel intersection between the ethical, the emotional, and the operational that forces research to engage with caring, emphatic, and ethically situated modes of work. This is obvious in relation to the task of building rapport. Building rapport using remote qualitative data collection methods can be challenging and problems associated with power imbalance are more likely to have negative consequences on the research process (Richardson et al 2021; Roberts et al 2021; Flick 2018), especially when conducting research on sensitive topics (Carter et al 2021; Mirick and Wladkowski 2019). However, our own work demonstrates that the efforts to foster rapport in the absence of direct face-to-face interaction might result in solid relationships promoting trustworthiness and safety (Howlett 2022; Upadhyay and Lipkovich 2020).

In this chapter we suggest the need to address the idea of sensitivity differently, moving from the framework of sensitive *topics* to the wider idea of sensitive *contexts*. Previous literature has questioned the usefulness of standardizing ethical norms across different contexts regarding what can be considered a sensitive topic (Mattingly 2005; Taket 2008). The meaning of sensitive topics is rather changeable than static; it depends on how researchers understand and adapt their research to the context, the time when the research is being conducted, the characteristics of the participants, and the aim of the study (Lee 1993). What we already know is that the SARS-CoV-2 virus has been unequally affecting populations in several socioeconomic aspects such as work and health (Immel et al 2022; Luck et al 2022). Therefore, the population considered vulnerable before the COVID-19 pandemic started could be now facing worse socioeconomic conditions.

Musicking balconies in Spain

Balconies (and windows) acquired an extraordinary relevance during confinement in Spain, particularly between March 14, 2020 (beginning of mandatory lockdowns) and April 26, 2020 (when relief measures started to be implemented). Although this was a national phenomenon, a review of newspaper material suggests that musicking was more frequent in areas with long musical traditions, such as Valencia (with a strong tradition of brass band playing) or the Basque Country (with a strong tradition of choral music). Previous work had already presented balconies as powerful artifacts that facilitate social and political life in the so-called Mediterranean urban configurations, defined by high population density, family units residing in (small) flats, and building

blocks that are (too) close to each other (Morant Marco and Martín López 2013; Aronis 2009). Through balconies and windows Spaniards clung to the life they wanted to recapture. In their *balcones*, Spaniards organized dance and theater competitions, but also impromptu religious parades. Children-made banners with positive messages were displayed while neighbors organized collective readings of poetry. And music was played, a lot of music. Right during the first weekend of confinement, a growing number of individuals started to play their music after the minutes of collective applause to express gratitude towards health workers and doctors. This involved professional musicians, but also many anonymous individuals who struggled to see themselves as "musicians". Performances were posted on social media either by the musicians themselves, by relatives, friends, or by neighbors. We developed a research project grounded on the idea that music-making can express a social message that transcends the quality of the music performed (Small 1999; Calvo and Bejarano 2020a, 2022). We built on the literature of social capital, resilience after disasters, and the sociological approach to music-making to explore the capacity of urban music rituals as generators of trust, solidarity, and identity.

The interview technique appeared as the most adequate approach in a context of uncertainty and physical distancing. We tested some other approaches, such as personal journals (in collaboration with respondents with whom we were already acquainted). However, the emotional instability associated with confinement and the fear of infection hindered the applicability of approaches that heavily relied on disciplined collaboration by respondents. Respondents mostly preferred the option of phone interviews, quoting privacy as the most important motivation. Accordingly, we conducted 38 phone interviews and six interviews over video link with the camera on with four types of performers: professional musicians, amateur musicians, music teachers, and DJs. Interviews over video link produced more nuanced data about the respondents' experiences with confinement; they were slightly longer in duration and warmer in terms of personal interaction between researchers and respondents. This confirms a recent work by Lindsay (2022, 6), where she argues that "it was often easier to develop rapport with participants when their camera was on". On the other hand, the election of a video link format could correlate with personal variables, such as access to comfortable working spaces at home, and generally a less stressful situation (less crowded environments or the absence of children at home). As we explain in the next section, the questions addressed several aspects of confinement, the reasons to play music, and specific questions regarding the selection of repertoire, staging, or the way neighbors reacted to their music. These were surprisingly emotional interviews that combined a theoretically guided search for knowledge with the desire to give value to a very innovative daily ritual. Our sample of interviewees drew from a long list of potential informants built between 14 and 1 April 2020. We made call-outs on several social media platforms inviting musicians to talk about their experiences with music-making on balconies. We also requested the help of informants who

had collaborated with us in previous projects (Bejarano 2020; Calvo and Bejarano 2020b). We considered every expression of music-making from balconies, regardless of technical proficiency or geographical location, and we quickly filled up a list with more than 150 names. Interviews were conducted as soon as access was granted, without any specific criteria or orientation. And we stopped as soon as the analysis of the interviews suggested saturation. Some of these interviewees are renowned professional musicians. Interviews were long, with an average duration of more than 50 minutes. The interviews were audio recorded and partially transcribed. Specifically, we did not transcribe contextual information about health and general well-being because such information was not related with the main aim of our research as we explain in the following section. The confinement facilitated the interviewer's task, as it was easy to arrange appointments for the meetings at virtually any hour. We discussed and shared our drafts, transcriptions, and interpretations with most of the participants.

Questions, research, and resilience

Our interview script did not fully conform with the expectations of traditional qualitative research, where the wording of questions, the pacing of the conversation, and the manners of the interviewer, however respectful and ethically rigorous they are, are tools to achieve high quality data. We chose a topic that connected with a virtuous reaction to the pandemic and developed an intentionally therapeutic script that, we thought, could help respondents elaborate positive and personally empowering personal narratives in very grievous times. Therefore, the quest to produce good data was inserted into the more pressing goal of praising respondents for engaging with innovative and valid social practices. This, of course, limited (but not eliminated) the depth of the information retrieved; however, this approach helped us develop a personally and epistemologically situated understanding of research that provided good data while contributing to the well-being of those working with us.

The script was divided into two large thematic blocks. The first one had a more personal orientation focused on non-musical aspects such as general well-being, interaction with neighbors and family members, and the use of social media platforms. The second one built on previous work in the sociology of music and ethnomusicology to deal with questions of repertoires, performances, styling, and interaction with the audience. The first thematic block of the interviewing list is more relevant here, as its specific configuration responded to our ideas about situated resilience. As displayed in Table 8.1, we structured it along three axes: health, work, and personal experiences during confinement. Something that needs to be highlighted is that "contextual questions", i.e., those questions that help the interpretation of qualitative data (Pink et al 2015), were overrepresented in this section of the interviewing list. For instance, we collected extensive but disorganized information about the respondents' physical and mental health. This information remains uncoded and was never meant to

TABLE 8.1 Personal and contextual questions

HEALTH	
PHYSICAL	Have you had SARS-CoV-2 virus?
	Has anyone in your family or someone close to you been ill?
	Do you get up-to-date information about the pandemic?
	Do you check yourself regularly for symptoms?
MENTAL	What is your state of mind?
	Are you overwhelmed by the situation?
	Do you think you need/will need psychological support after this?
	Do you feel sadder than before?
	Do you feel anxious, afraid, or depressed about the situation?
	Do you feel lonely?
	What do you miss from your former life?
	Do you sleep well?
WORK	
PRESENT	What is your current work situation?
	Do you work at home, do you work remotely?
	Has your work situation worsened?
	Do you like your job?
	Do you miss going to work?
EXPECTATIONS	Are you afraid of your professional future?
	Are you considering changing jobs after the pandemic?
EXPERIENCES DURING CONFINEMENT	
HOUSING	How are you experiencing confinement?
	Do you think your home is a good option for living in confinement?
	What do you miss in your home?
	Is the house where you live comfortable?
COMPANY and LIVING	With whom are you living in confinement?
	Are you able to go outside (for work, to take the dog out …)?
	Have you created daily routines?
	Are you bored or entertained?

be integrated into our analysis; we soon learned that personal reflections about the experiences with the SARS-CoV-2 virus were functional prerequisites for any meaningful conversations to be organized during those weeks, regardless of their scientific value. We sensed, and later confirmed, that the health crisis was having a significant impact on the psychological state of the individuals, so that questions about health shifted to mental issues (feelings of fear, loneliness, or sadness) as the research process progressed. This, however, was in no means intended to generate useful data that could shed any light on our main research question (i.e., why people performed music from their balconies daily and always at the same time). Contrariwise, this became a very useful tool for respondents to talk rather openly about their (perhaps) irrational fears and anxieties.

In relation to the second thematic block, it would have been legitimate, and perhaps even mandatory in a different context, to inquire about previous musical experiences, capacity to engage with difficult repertoire, or individual expectations in relation to the satisfaction of the audiences with musical performances. We did not do any of these. We never asked, for instance, if respondents thought that they were delivering adequate interpretations of specific repertoires, or even if their neighbors enjoyed that genre or instrument. Instead, we included questions with a different tone and orientation, for instance about the steps that led to the selection of repertoires ("did neighbors make suggestions?"; "did your kids help in deciding what to sing?", "is it difficult to sing without a microphone?"), and about the staging of the performance ("why did you switch the lights off?"; "Do you dress in a particular way?"). The initial analysis of data confirmed that most of our respondents were amateur musicians; many of them even questioned their consideration as musicians. They were playing musical instruments or singing, and our questions never allowed for a critical consideration of their aptitude.

Because of similar reasons we avoided mentioning social media impact. This included deleting interesting questions such as "do you think that your performances have an impact on the number of followers?"; "why do you post videos of your music-making online?"; "do you pay attention to other people that are organizing similar performances?"; "do you think that the popularity of your videos will help you to secure job opportunities soon?" We instantly realized that respondents frowned upon the insinuation of possible links between their decisions and a quest for public and professional recognition. Particularly in the case of DJs and professional musicians, we found some evidence that challenged the representation of their actions as purely altruistic. In different circumstances we would have explored further the role of online followers and on the consequences of their music-making during confinement in terms of popularity or profit. However, we decided not to do so, unchallenging responses like the following:

> I started to be known all over the place, but the best was the personal satisfaction of working and getting a marvelous result, the feeling when you see people who are touched by you. My neighbor was very grateful.

> The important thing is that I do something for others, I don't even think about fame and that at all
>
> *(i.17, professional musician).*

Or,

> I don't mind the social judgment, but I wouldn't want anyone to think that I'm trying to become the protagonist here with all this because I don't want to be labeled as something I'm not, that is to say, I am not looking for heroism or nonsense. It's something I do to maintain a certain connection and because I want people to be happy in some way within this chaos, but I wouldn't mind doing it anonymously either; the thing is that people don't follow you if you do it anonymously
>
> *(i.36, professional DJ).*

In a very difficult context, we acknowledged the value of decisively positive personal representations, accepting them as instances of personal resistance that deserved consideration and recognition.

Resilient interviewing

Research on sensitive topics result in strategies of interviewing that are meticulous about pace, intensity, and overall tone of the conversations. We trained ourselves in these principles with the aim of transforming the interview into a space of recognition and resilience. This was a conscious decision adopted by the research team and inserted at the earliest stages of the research design. We therefore expanded our gaze, accepting that the pandemic creates a sensitive *context*. This approach crystallized into several specific decisions. In the first place, in most cases we departed from the standard practices of cross-examination, avoiding well-known interviewing practices that "steer" respondents towards discourses that are (theoretically) relevant but perhaps not clearly formulated at first. Similarly, we did not ask participants to elaborate on short and brief answers, or on those where the interviewee did not manage to provide a clear response. Therefore, in the absence of an answer, or when we received a tense response, we did not insist. We knew from our own experience the harshness of the moment and we did not want to alter the state of mind of the individuals, which we assumed were already fragile. Instead of probing, digging, and trying to worm out information by asking again or questioning information that was too brief, we preserved the well-being of the interviewee by not insisting.

We allowed timeframes to be altered: people were idle at home, so the interviews were often longer than expected (sometimes going on for more than an hour). For some participants the interviews were a "balm" (telling their experience and narrating how they lived helped them), as they so stated in their answers.

> Don't worry, I'm bored, I have all the time in the world, you know (laughs)
> *(i.23, music teacher)*.

> I'm not in a hurry, I've already done everything I had to do for today, I've worked in the morning and now I'm working on things at home, so we can stay for hours
> *(i.3, amateur DJ)*.

We "let them talk", we did not try to restrict them or change the subject if they went into detail in their account. In contrast to some forms of traditional interviewing, where the interviewer guides and redirects the storyline, we were very lax with the narration.[1] We allowed them to elaborate and, at times, "lose" the thread of the script without expressly redirecting it. The weight of the personal and contextual elements of the interview (versus the purely musical) is reflected in the time dedicated to the emotional part of the interviews. While the interviews lasted an average of 50 minutes, the questions concerning the personal and contextual situation of the respondents took up more than half of the interview time (approximately 30 minutes), an exceptional circumstance that would not have been the case in another context. In other words, more than half of the total time devoted to interviewing was spent talking about issues unrelated to music-making.

We allowed the participation of family members or companions who lived together in case they so requested. We did not put any kind of obstacle in the way of this collaboration, which is rare and questionable in traditional interviews. If the interviewee needed the support of others in the telling of their story, we allowed it. If they wanted to sing with their child and show it to us, they did:

> We are all living this together, not isolated, each one in their own home, in their own bubble, but there is a certain feeling that we are with each other, accompanying each other / (The father interrupts): Otherwise, we get bored of seeing each other's faces, we end up fed up (laughs) / (The interviewee continues) Yes, it's better … If we sing, we don't argue; family peace above all (laughs)
> *(i.8, amateur musician)*.

Or similarly,

> Look, I keep the kid entertained because we play together … wait, pay attention … he wants you to listen to him (an accordion can be heard playing) Well, there he is (laughs)
> *(i.2, amateur musician)*.

Finally, another element of resilience was the way we began and ended the interviews. We went beyond cordiality to extend extremely warm greetings and closings. The beginnings started with a: "How are you feeling, how are you

doing?" and an immediate interest in their environment and mood: "Are family and friends well, are you all well, are you feeling well enough to talk?" Talking about music and balconies could come across as superficial and banal in the situation at hand (illness, death, collapse) if it was not introduced in an atmosphere of trust and respect for the interviewee. In these beginnings, we exchanged personal and family experiences, going beyond mere information to tell each other about the moments we were living through. We allowed ourselves to be more personally invested in these conversations than is normally expected in sociological interviewing:

> I go on Facebook live every day because people I don't know are watching me / Interviewer: Oh, pass me the link so I can give it to my parents so they can listen to you, they will love it / Sure, I'll pass it on to you, if you want, we'll dedicate a song to them in exchange for the chat, I've had a great time / Interviewer: Done, everybody's happy! (laughs)
>
> *(i.15, professional musician).*

In the goodbyes, we established a ritualized way of ending the interviews: "We hope you are well, take good care of you and yours and thank you very much for what you do, it helps us. If you need anything, you know where we are". We were grateful for the effort made to reinforce the community work that these individuals carried out through the arts, and we distanced ourselves from the intrinsic neutrality of many forms of social research (we wanted them to continue doing it and we told them so). Furthermore, we showed our willingness to help by leaving open the option of continuing the established relationship if someone needed it. We crossed the line that separates researchers and informers since, in some cases, relationships were created and maintained with the interviewees after the fieldwork had been carried out, something unusual in sociological work (although more common in anthropology, for instance). We established bonds of friendship that have been maintained over time, based on a personal and familial interest in each other.

In short, we relied on a wealth of resources that in other circumstances would not have been appropriate. And it was not just a matter of pampering the interviewees; it was also an exchange, an assumption of the same problematic and, above all, a reaffirmation of the artistic action they were carrying out. And all this was done beyond mere cordiality or politeness, which is why we speak of empathy as a resilient tool in the development of the interviews. Methodological empathy opens the possibility for affirmation and recognition of individual and collective actions carried out in difficult situations, allowing for the exchange of experiences and the expression of support towards participants in the research.

Beyond saturation

Our research produced quite unique and rich data about the rituals of music-making during lockdowns and about the motivations for these rituals. This was

data generated while respondents were engaged in the practice, not data resulting from personal recollections of past decisions. This is particularly relevant considering the very high levels of social receptivity during the first waves of the pandemic, with collective moods that dramatically and quickly changed according to new revelations about the death toll caused by the SARS-CoV-2 virus

The mere act of conducting data collection amid a global pandemic could entail consequences for the validity and the ethical commitment of qualitative researchers. First, data is being gathered about an ongoing event that could be far from ending. The results could show readers an incomplete picture of the COVID-19 global pandemic (Jowett 2020). Second, it might be ethically challenging to justify research during a sensitive *context,* particularly one that is threatening the health and safety of the global population (Roy and Uekusa 2020). As we have seen in the preceding sections, our work tried to deal with these reservations by situating the scope of the research and the data gathering protocols within a respondent-centered framework that values care and the promotion of resilience over the sheer impact of scientific data. We hoped to help respondents by allowing them to talk about a very conforming social practice. We fostered methodological empathy. There were emotionally intense moments with no place in traditional research. We let respondents speak without redirecting the thread of the argument, we spoke with affectionate expressions, we did not interrupt the tears when they appeared, we cheered them up, and even sang with them. We used an extremely affectionate tone, particularly long silences, personal references to our situation and to our families:

> I miss my parents the most, it's what I'm having the hardest time with / Interviewer: I know, just like me, it's the worst. How old are they? Mine are quite old and I keep wondering all the time how they are … / Well, they're in their 80s and they're all alone there and I'm far away … Well, you know what I mean, I don't need to tell you / Interviewer: Indeed … Well, hopefully we will be able to see them soon, let's keep our fingers crossed
>
> *(i.33, music teacher)*

And in the process, we (selfishly) found new ways to cope by adapting our professional skill-set as sociologists to the task of giving (some) voice to practices of resilience and community building. This is a process that contributes to the dissolution of the separations between respondents and interviewers; researchers open to respondents far more than is normally expected in qualitative research in sociology. Intimacy, therefore, becomes an additional dimension for exchange between researchers and respondents, virtually a necessary condition to justify research pursuits in such difficult circumstances. We never avoid using our experience and life events in the development of the research, and our vulnerability was reflected in the ways we approached the interviewees.

We wanted to discuss a final alteration caused by the pandemic, one that relates to the issue of theoretical saturation. As well established by the principles of grounded theory, theoretical saturation appeals to a threshold of satisfaction where researchers consider that their data can produce an organized account of their research problem (Bryant and Charmaz 2019). Many requirements need to be met for this threshold to be reached; at the same time, however, there are powerful signs that are often valid as indications of saturation, such as word repetition by different classes of interviewees, similarity in topics discussed, or convergence in blame attribution or the definition of the purposes of action. We decided to have reached *theoretical* saturation at some point after the first 30 interviews. Our typology of participants (professional musicians, amateur musicians, DJs, and music teachers) was already clear at that stage; similarly, we found sufficient indications to explain the motivations for music-making as a practice of resilience, one that operated at different levels of proximity in the promotion of different forms of social capital. We, however, proceeded with the interviewing, adding some 14 interviews on the grounds that these were beneficial *to us* as well as (at least so we hoped) *to them*. In some of these additional interviews we were responding to invitations by previous participants, who knew of the experiences of fellow musicians, and who encouraged us to talk to them on the grounds that they "would very much like to explain why they are doing this". From our perspective, the extended process of interviewing represented yet another way to grasp some of the shifting moods caused by the pandemic; it also provided new ammunition for our goal to insist on sociology as a valid and useful discipline during difficult times.

Conclusion

Qualitative interviewing should not shy away from the task of promoting resilience. In difficult times, qualitative interviewing might face the duty to combine the quest for valid and solid scientific evidence with the promotion of the well-being of both respondents and researchers. The goal of generating ethically informed knowledge should be qualified by a caring, epistemologically fluid orientation that seriously considers whether our research is both useful and necessary, and in what ways our participants will benefit from it. The perception of the interviews as safe spaces highlighted the importance of the researcher acting as listener (McClelland 2017). The COVID-19 pandemic has prompted qualitative researchers to adapt ongoing research, and traditional questions about the validity and credibility of qualitative research (see Morse 2015; Sandelowski and Barroso 2002) remains very much alive. Reflexively addressing research issues, such as the safety and well-being of participants and researchers, when conducting qualitative research is warranted to improve methodological, ethical, and validity issues in the new context of the COVID-19 pandemic (Pilbeam et al 2022). Although new approaches are always welcomed, adapting qualitative research might be creating new issues such as blurring

boundaries between researchers and participants due to shared experiences in the same context about a common phenomenon such a global pandemic (see Pilbeam et al 2022).

Pandemic times are sensitive contexts, radically new spaces that force researchers to refrain from using certain tactics and show a renewed commitment to care and respect. This, however, pays off in terms of the generosity of participants and in terms of their candor and willingness to collaborate. In this chapter we have discussed our approach to remote interviewing during lockdowns. We picked a topic that complied with the need for the social sciences to generate valid and reliable data on virtuous social practices during the pandemic. We interviewed musicians with the hope of giving further resonance to their involvement in music-making from their balconies. Previous research has raised questions about the ability of remote qualitative data collection methods to gather sufficient contextual information (see, for instance, Watson and Lupton 2022 or Richardson et al 2021). The experience discussed in this chapter confirms that the COVID-19 pandemic generates new possibilities for modes of interaction between researchers and participants that can result in very rich qualitative data.

The global dimension of the COVID-19 crisis and its consequences in all walks of life compels a reconsideration of ideas about neutrality and ethical responsibility. We designed a research project from our homes in a context of large personal stress. We talked with musicians who endured similar states of anxiety; and we found that these musicians decided to embed their artistic imagination within a larger desire to help and assist. Traditional (although contested) ideas about neutrality have contributed to the development of the scientific credentials of social analysis. We believe in the positive consequences of analytical approaches that are transparent about the differences in value orientations between researchers and the populations researched, and also in the applicability of protocols to separate these value orientations. Lockdowns, however, were exceptional times and exceptional times invite exceptional solutions. Our experience with qualitative interviewing during lockdowns prepares us to accept that qualitative research conducted during similar exceptional circumstances will have to look at a different epistemological and ethical framework, permeable to intimate associations between researchers and populations, and proud of the new forms of scientific knowledge that blossom from collective attempts to resist and thrive.

Note

1 Two of the three authors of this piece conducted the interviews. Having already worked together in previous projects, we do not see any meaningful differences in terms of style or approach between the two authors, and we believe that gender or age differences of the researchers did not bias the outcomes of the interview in any significant way.

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SECTION III

Critical pandemic methodologies

9

REMOTE INTERVIEWING DURING A GLOBAL PANDEMIC

A methodological reflection on an ICT-mediated qualitative study implemented during COVID-19 confinement periods

Concetta Russo

Introduction

Research techniques are social scientists' tools for collecting data and answering research questions in order to contribute to the understanding of a specific aspect of the social world. As the world we seek to understand is constantly evolving, the repertoire of techniques we have at our disposal often need to be revised and enriched (Hesse-Biber and Leavy 2006). The COVID-19 pandemic, as outlined by Ryan et al (2024) in chapter one of this volume, has been posing a series of practical limitations to qualitative research from a methodological point of view, limitations generated by the civic imperative of physical distancing and the need to preserve the health of both researchers and study participants. Due to the aforementioned limitations, some scholars have championed the improvement of data collection techniques that forgo personal interaction (in presence), developing mediation strategies to obtain similar results (Hine 2020; Horst and Miller 2020; Lupton 2020). However, what appears to be a limit might also represent an opportunity to epistemologically re-examine our toolbox, and to reshape and reformulate research techniques in light of current concerns.

In social research, qualitative data collection techniques, such as interviews, focus groups, and ethnography, still rely predominantly on face-to-face encounters (Hine 2015). Nonetheless, the widespread use of the internet and the extensive availability of devices with integrated web-cams have made the realization of interviews mediated by the use of information and communication technology (ICT) increasingly common, a phenomenon further diffused and normalized by the outbreak of the COVID-19 pandemic (Hanna 2012; Hooley et al 2012; Lupton 2015; Lo Iacono et al 2016; Hine 2020; Melis et al 2022). For instance, the use of digital platforms such as Skype, Zoom, and Webex has been introduced by some researchers to overcome the practical problems associated

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with the realization of in-person interviews (Ahlin and Li 2019). In other cases, such platforms have been used to create conditions of greater convenience (in terms of time consumption, for example) for interviewees (Janghorban et al 2014). However, differently from web-native research techniques, which investigate natively digital data (Rogers 2013), ICT-mediated interviews are the result of a transformation that converts a common qualitative research technique from analogue to digital. A transformation of this sort should not be applied unquestioningly, inasmuch as it imposes a critical reflection on how ICT-mediated interviewing affects the relationship between the researcher and the participants (Ahlin and Li 2019; Horst and Miller 2020), and therefore the investigation results.

Pierre Bourdieu (1972) argued that when we analyze collected data, we should take into account the relationship between our research technique and the information that specific technique allows us to collect. Thus, the French sociologist suggested considering how this relationship can inform the dissemination process and, more broadly, the way we decide to participate in academic debate. In our relationships with research participants, do we trust them as interlocutors or do we consider them merely informers? Do we let their narratives (data) alter our conceptual frameworks, or do we impose those frameworks onto data? Martin Holbraad and Morten Axel Pedersen (2017) introduced the concept of "recursivity", which maintains that data can directly transform concepts, and consequently that theoretical arguments are inseparable from the data that inspire them.

Stemming from these considerations, this chapter offers a reflection on the critical aspects of implementing a qualitative inquiry mediated by the use of ICT, and in particular of remote interviewing. It adopts as a case study a research about self-employed workers, carried out between January and June 2021 in the metropolitan area of Milan (Italy). The aim of the study was to investigate the impact of the COVID-19 health, social, and economic crisis on a group of highly skilled solo self-employed workers (self-employed workers without employees), focusing on their job insecurity, family planning, and daily life organization.

In an attempt to unravel the Gordian knot of the relationship between the observer (researcher) and the observed (study participants), in this chapter I focus on self-employed individuals' perceptions of remote working, drawing from content that emerged from the narratives I collected. During the research period, remote working was both a topic of discussion and a condition I shared with the participants since I, like the majority of my interviewees, was also working from home. In the following pages, after offering a background analysis and presenting my case study, I will analyze the impact of working remotely on the job performance and daily life of the self-employed. Thus, I will discuss how ICT-mediated interviewing as a digital research technique could challenge the power asymmetry created by the prescribed roles of the interviewer and the interviewees in the data collection process (Anyan 2013).

Background

Nowadays, people around the world are accustomed to the changes that ICT has brought about: they use the internet to read the news, watch movies and TV shows, seek employment, reserve seats on trains, book tables at restaurants, and buy tickets to the theatre.[1] In addition, they use the internet to communicate with friends and family, share experiences, meet new people, and find love and friendship. In brief, their everyday lives are both "embodied" by – as Christine Hine (2015, 14) argued "we find ourselves being online in an extension of other embodied ways of being and acting in the world" – and "embedded" in ICT – since "the Internet is often not experienced as a transcendent 'cyberspace'" (ibid.) but rather as a constitutive part of people's lives. The COVID-19 outbreak at the end of February 2020 and the containment measures that followed[2] appear to have exacerbated the described phenomenon of the digitalization of everyday life (Bonazzi 2014; Denicolai and Farinacci 2020). In the interest of continuing to operate under the physical distancing restrictions that were established as contagion mitigation measures, many companies, public organizations, and workers rearranged their jobs in order to work remotely from home, adopting the so-called "smart working mode" (Bolisani et al 2020). Indeed, despite the greater availability of high-speed internet and the advanced capabilities of ICTs, remote working was not a widely adopted practice prior to the pandemic (Kossek and Lautsch 2018). Anti-COVID-19 measures certainly accelerated digital transformation and necessitated remote working for a variety of activities (Giubboni and Mingione 2021).[3] Suddenly, working away from one's regular job-site by connecting to it through electronic networks became the norm for many (Wang et al 2021; Fullin et al 2022), along with other computer-mediated experiences. If up until that moment ICT represented an enrichment of our possibilities to experience the world, during the pandemic it became a symbol of the difficulty of dealing with physical and social confinement (Nguyen et al 2020; Del Líbano et al 2021). Thus, several scholars agree on the need for further consideration of the potential benefits and pitfalls of working from home (Arntz et al 2020; Bolisani et al 2020; Dockery and Bawa 2020; Melis et al 2022). For instance, some sociologists have argued that this induced shift in working patterns "has represented a context of 'experimentation' of new strategies in redefining the boundaries between paid work, social reproduction and social life" (Carreri and Dordoni 2020, 824).

The case study: COVID-19's impact on solo self-employed workers

Following the dismantling of the figure of the wageworker in favor of increasingly atypical and spurious forms of employment, the self-employed worker has assumed an increasingly important role, embodying the process of the transformation of work subjectivities that began in Europe in the late 1970s and is still ongoing today (Bologna 2018). Nonetheless, in Italy, a legally defined social

condition for self-employed workers has yet to be created (ibid.), and the evolution of the socioeconomic status of this workforce segment needs a more fine-grained analysis (Eurofound 2017a). On the one hand, this lack of definition has stimulated scholars to investigate self-employed workers as an emerging category striving to construct its own identity (Borghi and Murgia 2019; Muehlberger and Pasqua 2009; Ranci 2012). On the other hand, it has made it difficult for self-employed workers to find a collective voice when they fight to increase their level of social protection and benefits (Giubboni and Mingione 2021).

Italy has, among European countries, one of the highest rates of self-employed workers: 23% of the national workforce compared to the EU average of 14% (Eurofound 2017b). Self-employed people[4] arguably represent the group of workers most affected by the socioeconomic consequences of the COVID-19 pandemic (Visanich and Attard 2020). According to the data of the Italian National Institute of Statistics (Istat), after the first wave of the epidemic (between April and May 2020), their households recorded a decrease in income of approximately 79%, against an average of 50.8% for the rest of the workforce. In particular, those between 30 and 39 years old represented the most affected age group (Istat data, updated in June 2020). Beginning with these data, I designed a research project that aimed to investigate the personal narratives of a group of solo self-employed workers. By systematically collecting and comparing different narrative patterns (Miller 2005), as well as the semantics that describe biographical experiences, decision-making, and expectations (Zinn 2010; Küsters 2014), my goal was to tackle the limits of generalized aggregated data by engaging with a "subject-oriented approach", which "systematically takes into account reciprocal impacts between individuals and social structures" (Murgia and Pulignano 2019, 32).

Research design and methods

Interviewees were contacted through chain referral sampling, which began with personal contacts and messages posted on social media. I used Facebook as the main platform to connect with potentially interested self-employed workers. Consequently, my personal identity as a researcher was rather clear, because a series of basic information about me is available on the platform. For the aims of this study, the main inclusion criteria guiding the sample construction were: (1) solo self-employment condition, (2) working mainly in the metropolitan area of Milan,[5] and (3) age (30–40). The 20 in-depth video interviews were conducted in Italian,[6] lasted between 45 and 120 minutes, and took place on an online platform (Webex or Skype). The interviews were fully recorded and transcribed, and subsequently encoded with the NVivo program.

In Italy, self-employed workers are mainly highly educated professionals (Borghi and Murgia 2019). This fact, along with the intrinsic limits of using chain referral sampling, attracted to the study mainly workers performing high-skilled jobs (architects, graphic and web designers, entertainment industry

workers, lawyers). The mean age of the interviewees falls near 36 years old. Eleven of the interviewees were women and nine were men.

The interview explored five dimensions: (1) individual career trajectory; (2) daily working life before the pandemic; (3) well-being and work-life balance; (4) strategies enacted to cope with the effects of the COVID-19 pandemic on job routine and everyday life in general; (5) expectations for (a post-pandemic) future. The topics were not structured as a set of questions. Instead, acknowledging the negotiation of discursive knowledge between researcher and interlocutors (Marcus 2000), I encouraged explanation by "emplotment" (Ricoeur 1979) in order to orchestrate a more participatory analytical path. This key feature of in-depth interviews allows for "an intuitive grasping together (prendre ensemble) of otherwise heterogeneous elements" (Dowling 2011, 4). During the interview analysis, this "grasping together" fosters a better understanding of the meanings that interviewees assign to their actions as they relate to their identities (Miller 2005). Coherently with this strategy, the interview transcripts were compared in search of a complex model of redundancies (ibid.), and thematic nodes were identified and compared in a stratified manner.

Finally, since an interview is a performative and interactive social situation (Holstein and Gubrium 1995), I integrated the virtual setting of the interviews into the analysis by considering how and where my interlocutors chose the place for the interview and set their cameras (i.e., if their background was visible; if there were other persons in the same room). Also, unwanted interview interruptions and my interlocutors' silences, un/intentional speech failures, and direct questions about my situation were considered part of the analysis. Since the focus is on methodological insights, I will not present a complete analysis of the recollected data. Nevertheless, I will introduce some interview excerpts to discuss how my feelings about one of the research topics (working from home during the pandemic) have been reflected on and transformed as part of the research process (Ezzy 2010).

Self-employed working from home

Among my interviewees, 15 self-employed workers started working from home during the first wave of the COVID-19 pandemic (architects, graphic designers, lawyers, and video makers), four were forced to suspend their job activities (a saleswoman, an actor, a scenographer, and a performing artist), and only one (a babysitter) kept working in-person almost regularly. When we spoke about what kind of changes working remotely brought to their lives, Alina, a 31-year-old video maker, focused on the relationship between time and workload:

> I worked from home during the first lockdown, March–April 2020, and the situation was bad because I worked almost around the clock. Because of the pandemic, working became "being available any time" for the solo self-employed, in most of the cases I've experienced or heard about. Because

> "you're at home anyway, you have nothing else to do", and "we have to keep the customer happy because otherwise …" you don't know what happens. […] And so, I worked from home during March and April and I made – I don't know exactly – about six hundred euros in two months. Nevertheless, I worked every day, all day.

Similarly, Marcus, a 31-year-old web designer, declared: "Now that I'm working remotely, I work ten hours a day instead of eight and earn 50% less: clients are demanding, and I'm afraid I'll lose them". Differently from "smart working", which revolves around workers' bargaining power to perform their job activities as they see fit, working from home during the pandemic became synonymous with working overtime (Azzolari et al 2021; Bertolini et al 2021; Bertolini and Fullin 2021). Even though some scholars have interpreted this as a manifestation of the strengthening of workers' collective identity in response to the common challenge represented by the COVID-19 outbreak (Fullin et al 2022), when overload is combined with a decrease in income, as in the case of my interviewees, it is understandably accompanied by some degree of frustration. As Alina pointed out: "there isn't a normal working regime, it's just about working every day, all day long, and the customer does what they want, asks what they want, and you have no right to say anything".

Moreover, as scholars have found (Collewet and Sauermann 2017), working overtime does not necessarily entail an increase in productivity. For instance, Liam, a 38-year-old architect, found that the relationship between his working time and his productivity was suffering: "Working from home is uncomfortable, you always end up on the phone, always connected, and the working day becomes longer but not more productive". Due to the form of remuneration self-employed workers receive, "which is no longer commensurate with elementary units of time (hour, months), but with the performance of work for which only the result counts" (Bologna 2018, 114), the working day has the potential to become longer without any increase in remuneration.

In a mixed methods study of Italian remote workers carried out during the confinement period of spring 2021, which collected 200 in-depth interviews and 900 survey responses, 62.5% of workers declared that their workload increased under the smart-working model (only 8.1% declared a decrease) (Bertolini and Fullin 2021). Indeed, even if home-to-office mobility has a personal and social cost, it entails a clearer separation between working time and personal time. Due to the lack of a tangible separation, in physical terms, between the home and the workplace, i.e., a place that is "left" once the workday is done, working from home, in particular during the confinement situation that characterized the early stages of the pandemic, becomes synonymous with working the whole day. Moreover, for solo self-employed workers, the blurred lines between working time and leisure/family time overlapped with the fear of losing clients in a time of uncertainty, to the extent that even getting sick became an issue.

Indeed, as emerged from the interviews, the boundary between being healthy and being sick was another one that seemed to blur with remote working. As Amelia, a 29-year-old lawyer, claims:

> So, when I got COVID-19, being a self-employed lawyer, I called the *Cassa Forense*[7] and they told me they did not have any agreement in place at the moment for paying my sick leave (…). So, I had a fever, I was not feeling well at all, to the point that I had to lie down most of the time, but I still had to work. I continued to work; I did my hearings from home, remotely. So, I was basically at home sick with COVID-19 but acting as if I were perfectly healthy.

Nicola Illingworth (2006) defined technology-mediated communication as a form of "disembodied" dialogue. This refers to the lack of physical presence in the setting of a virtual meeting. In the words of Amelia, the disembodied dialogue with her clients became synonymous with denying herself the possibility to have a body at all, a body that could be ill and in need of resting. Indeed, as scholars have pointed out, having to deal with an illness is one of the major concerns for self-employed people, both for the immediate consequences, such as losing money because they are not entitled to paid sick leave, and for the medium- and long-term consequences, such as losing clients and networks (Borghi and Murgia 2019). In the case of the COVID-19 pandemic, it appears that working remotely could unveil new layers of complexity. In the words of Amelia, being a self-employed lawyer not only prevents her from receiving "paid" sick leave, but also from "leaving", since already being at home makes "working while you are sick" a viable option, to the point that one might act as if they are not ill at all.

Another issue that emerged from the interviews concerns the sudden transformation of the living space into a working space. For instance, reflecting on having to turn their home into an office almost overnight, Oliver, a 36-year-old architect, highlighted how their city apartment felt "crowded" for the first time:

> Your desk is in your bedroom, isn't it? I guess we're all in the same boat … due to the size of the apartment, my wife and I had to work shoulder-to-shoulder when one of us was on a call … well, it was a bit uncomfortable, also not having that thing, when you come home at night after spending the day apart working, and you enjoy having dinner together while hearing about your spouse's day … it puts pressure on the relationship … of course, you cannot complain, people are dying, but still … It was not a pleasant period.

Similarly, Charlotte, a 30-year-old web designer living with two roommates in a loft, declared that "finding a space to work" was particularly challenging for them:

> Is that a crib, just behind you? I guess you sleep there too … [moment of silence, she waits for my answer, I just nod] Working where you sleep,

> where you eat, is really harmful to your mental health … so, both my roommate and I had to carve out a space at home to work. Our home is a loft, so everything is very open, without walls and basically without doors. So that's where the situation revealed its limits.

On the contrary, Marshal, a 38-year-old lawyer, who was living alone during the pandemic, felt "completely isolated" and "totally absorbed by work":

> So I worked completely alone and from home from March to August … I spent most of the time in my pajamas and I felt … actually I was … completely isolated. Also, I just had my job, I was totally absorbed by it.

While the alienation of wage labor divides the individual into two socio-affective cycles (private life, working life), the apparent non-alienation of independent work reduces existence to a single socio-affective cycle (Bologna 2018): working becomes part of the private life. The COVID-19 pandemic has exacerbated the phenomenon that Bologna and Fumagalli (1997 describe as the "domestication of the working space", which refers to the advent in post-Fordist society of a mixture between the space in which work takes place and the space in which private life takes place. Avoiding commuting by working remotely is usually considered to have a positive impact on the balance between the work and family spheres (Bolisani et al 2020). Nonetheless, the sudden shift to remote working caused by the pandemic seems to have led, on the one hand, to an unlimited working day and, on the other, to the increasing intrusion of work issues into the intimate space. By eroding the family/personal space, as in the cases of Oliver and Charlotte, or by obliterating the personal space to the point that having a job becomes the only thing that matters, in the words of Marshal, working from home seems to further erode the already blurred lines between work, intimacy, and leisure time.

In their narration of remote working, my interlocutors seem to share the difficulty of finding a balance between their "role embracement" and their "role distancing" (Kunda 2006) as self-employed workers. Indeed, on the one hand, they described their work activities as crucial to shape their everydayness despite the pandemic-induced limitations. On the other, their narration underlined the struggle to maintain some work-life boundaries, setting a distance between their job identities and the life spheres other than work. Similarly, I, a working-from-home researcher, shared with my interlocutors some of the issues mentioned in the excerpts of the interviews (e.g., the contamination between workspace and personal space, the difficulty of preserving work-life balance while working remotely, and the concern with productivity). Thus, as I shall explore in the following paragraphs, during the interviews, I struggled with maintaining a balance between fully embracing my role as researcher/observer and, by distancing myself from it, unravelling my involvement in the mundane realities presented by my interviewees. The emotional labor (Hochschild 1983)

this struggle required of me, I maintain, was to pave the way for a more significant reflection not just about my interviewees' narrations but also about the way I embodied, emoted, and performed (Ezzy 2010) my questions to them and my answers to their questions to me.

Remote interviewing: Power dynamics and emotional labor

In-depth interviewing is a qualitative research tool that should provide a researcher with an in-depth understanding of the phenomenon they are interested in. Owing to its intrinsic ability to collect not only social actors' experiences, but also their narratives, predicaments, needs, and expectations, it is key to interpreting the specific meanings those actors assign to their actions and, more generally, to their life-worlds (Kvale 2006). Nevertheless, in order to avoid projecting their preconceived interpretations onto others, researchers ought to problematize the epistemological outcomes of the power imbalances in the interview methodology (Anyan 2013).

The power dynamics during an in-depth interview can be covert or overt and are determined by many factors, such as educational or professional background, socioeconomic status, ethnic identity, and gender, just to highlight a few (Kvale 2006). Other power imbalances concern the interview methods, since a variable amount of asymmetry can stem from the prescribed roles of the researcher and the participants of the study. Indeed, the interviewer is usually the one who arranges the meeting, controls the agenda-setting (Hoffmann 2007), and modulates the questioning, relying on the study hypothesis and topics of interest (Brinkmann and Kvale 2005). It is also the researcher who holds the third-dimensional power, deciding how to analyze, interpret, and disseminate the research results (Mauthner and Doucet 1998). Nevertheless, as Hoffmann (2007) argued, power during a qualitative interview is always an object of negotiation. Thus, an understanding of the power shifts between researcher and interviewee is crucial to both the quality of the interviewing process and the gathered data interpretation. Furthermore, "the shifting nature of power in the interview context can be seen in how the interviewer must perform substantial emotional labor" (Hoffmann, 2007: 320). Part of the interviewer's emotional labor consists, for instance, in being able to evaluate from time to time whether expressing personal emotion could endanger the quality of the interview or, on the contrary, promote the interlocutors' engagement in the research process (Holstein 2002; Hoffmann 2007; Ezzy 2010).

Setting an ICT-mediated interview in the context of qualitative research implies a conscious abandonment of some power on the part of the interviewer. For instance, in the case of uncomfortable questions, ICT-mediated interviews offer participants the possibility to more easily interrupt the conversation at any time by simply pressing a button on their device, which would not be possible during an in-person interview (Deakin and Wakefield 2013). In a study that brings into play the personal/biographical aspects of the life of the

interviewees – such as the one I am presenting here – Illingworth (2006) suggested that remote interviewing could be configured as a way to establish communication that can defuse the tensions, constraints, and expectations that characterize the offline world. Furthermore, as Daniel Miller (2020) underlined, carrying out in-depth interviews during a pandemic means considering among the critical aspects of the research the very reason driving the researcher to realize ICT-mediated interviews, which is the existence of the pandemic itself, with all the consequences this implies for people's physical and mental well-being. This means that the researcher should always be aware of the type of situation in which the interviewer and the interviewee find themselves. It also means the researcher should consider that the main restitution they can give to their interlocutors is the willingness to listen to them and to be invested in what they desire to tell them, even outside the domain of the research questions. This sense of compensation, which Geertz (1973) defined as the interviewer's personal perception of having to somehow repay the interlocutors, is ultimately necessary for the researcher to maintain self-respect once they recognize that their research does not have tangible positive outcomes for its participants. Finally, Laura Robinson and Jeremy Schulz (2011) recommend making the researcher's identity strategically transparent, providing clear and accurate information about who is conducting the research and why. Indeed, unlike the situation experienced by those who do offline ethnographic research, and thus enjoy the opportunity of fitting into interactive spaces (whether public or private) by building relationships and gradually gaining the trust of their interlocutors, the cyber-ethnographer faces the challenge of making this happen in the virtual realm (Hine 2008; Robinson and Schulz 2011).

Remote interviewing remote workers

In synchronous online interviews, the interaction and sharing of experiences are framed by the researcher and participants' online presence (Robinson and Schulz 2011): they share a (real) time and a (virtual) space.

As for the time, the difference in interview durations (between 45 min and 120 min) is ascribable both to the self-employed different working schedules and to the medium. As I mentioned, my interlocutors were high-skilled and high-educated workers who got accustomed to long videoconference calls during the pandemic. This habit facilitated the implementation of ICT-mediated interviews. Nevertheless, some of them perceived the interview as a part of an already heavy online meetings schedule and asked me not to take more than an hour of their time. A request, of course, I fully respected. Different from a face-to-face interview, where it is also possible to follow the interlocutor in some of their everyday chores and thus alleviate the "theft of time" (Geertz 1973) the researcher imposes on their interlocutors (during my past fieldwork, for instance, I interviewed people while they were cooking or tidying up their home). Online interviews, by being associated with other virtual meetings, seemed to require the full devotion of their attention; none of them appear to be involved in any other task while talking with me.

As for the space, the interview setting played a more important role than I anticipated. To conduct an in-depth interview, the researcher usually meets their interlocutors in their everyday surroundings, which implies the willingness of the study participants to welcome the researcher into their home, workplace, or another venue they usually attend (Weiss 1995; Hillman et al 2015). Due to physical distancing and stay-at-home policies, my interlocutors and I shared not only a digital venue but also the willingness to welcome one another into our domestic spaces, even if only virtually. On the one hand, the fact that the majority of my interlocutors were already working from home made conducting synchronous online audio and video interviews more viable since they mostly already had the equipment necessary for remote videoconferences in place. On the other, differently from a face-to-face interview, where objects with spatial prominence to the interviewees often offer material for the conversation (Woodward 2001), in the online interview, the observation of physical surroundings could be mutual between the researcher and their interlocutors. For instance, when setting my workspace at home, knowing I would carry out online audio-video interviews, my principal concern was about the lighting and the silence. Since I do not have a studio at home and my child was just one year old, I considered arranging a workstation in my bedroom the best option for avoiding interruptions and other difficulties with the audio-video recording. Doing so, I underestimated that a glimpse of the crib behind my back would become a topic during the interviews, let alone a methodological turning point in the relationship with my interlocutors.

When I discussed with my interviewees what strategies they had put in place to cope with the consequences of the COVID-19 pandemic on their job routine and on their everyday life in general, all of them brought up the topic of "remote working", even those who were not able to work from home due to the nature of their job. The fact that I was visibly performing my job (researching) from home seemed to shift the terms of our conversations, so much so that the majority of them showed they were feeling more comfortable thanks to the symmetry of our conditions. In particular, I observed how my interviewees showed a greater willingness to engage in meaningful and in-depth conversations when talking about a topic they felt constituted common ground, such as the lack of a dedicated workspace at home (underlined in the excerpts of Charlotte and Oliver) and the difficulties of managing the work-life balance (underlined in the excerpt of Alina).

"Is that a crib, just behind you?" seven of my interviewees asked me, indirectly acknowledging that I must have a baby or a toddler. Three interviewees also asked how I was managing parenthood while working remotely. Ron, a 40-year-old stage actor and novelist, asked me:

> How are you coping with working from home and caring for your child? … Since the theaters are closed and I can't work, I'm writing my second novel and I usually write at night because with children it's impossible to do so during the day.

Monica, a 37-year-old scenographer, who gave birth to her first child three months before our interview, closed her statement about the difficulty of being a working mother with "I'm sure you get it":

> To be quite frank, in the Italian labor market, a pregnancy is not a well-received thing in general. I understand why women don't have children anymore, it's not just about having the money, it's that everything seems to be against you, it's too hard. If you're a self-employed worker, being pregnant could ruin you. And after, being a mother … This is not a country for mothers. Society works against you. I'm sure you get it.

Like Monica, who felt comfortable sharing critical statements about motherhood due to her assumptions about my position on the topic, Oliver (36, architect), when describing how he felt his apartment was "crowded" in the previously quoted excerpt, began by observing the situation I appeared to be in: "your desk is in your bedroom, isn't it? I guess we're all in the same boat … due to the size of the apartment, my wife and I had to work shoulder-to-shoulder …". Moreover, when speaking about their remote working experience, 11 of my 15 interlocutors added locutions such as "like you do", or "I see you are too", or "you can understand the situation".

By asking my interlocutors to describe their working life during the pandemic, and consequently to share some challenging or unpleasant situations, I was exerting a certain amount of agenda-setting power. In the same way, by interpreting the collected data and deciding how to report the narratives recounted to me in my research results, I was also entitled a third-dimensional power, as author of the resulting story (Mauthner and Doucet 1998). Nevertheless, by virtually welcoming the study participants into my home/working space and implicitly showing that I was experiencing at least some of their remote working-related issues, I assumed the posture of the vulnerable observer suggested by Behar (1996). Being a vulnerable observer does not imply the unveiling of the researcher's autobiographical horizon, but it "does require a keen understanding of what aspects of the self are the most important filters through which one perceives the world and, more particularly, the topic being studied" (Behar 1996, 30). In particular, some of my interlocutors' questions and observations about my working space and parenting challenges contributed to creating what Ezzy (2010) defines as "a moment of recognition of simultaneous sameness and difference" (Ezzy 2010, 164). The emotional labor I invested to navigate those moments of recognition, and the consequent re-negotiation of emotion "display rules" (Hochschild 1983), played a role in putting the interviewees at ease and, at the same time, in highlighting the need to carefully consider "how power shifts and emotions within the interview are, themselves, important data" (Hoffmann 2007, 344). In particular, acknowledging the power shifts in my relationship with my interviewees led me to further explore a topic (remote working) that was originally meant to be marginal in my research

design, and to make explicit the influence that the virtual setting of the interviews had on both my interlocutors' narration and my interpretation of it. Ultimately, my goal was to follow Douglas' (1985) suggestion to consider a research encounter as "a creative search for mutual self-understanding" (Douglas 1985).

Conclusion

During the COVID-19 pandemic, the "disembodied" dialogue (Illingworth 2006) represented by ICT-mediated encounters became one of the most common mitigation measures to overcome the social distancing and stay-at-home guidelines governments and public health institutions across the globe implemented to battle the spread of the pandemic (Nguyen et al 2020; Ryan and Nanda 2022). Millions of people across the world adapted their job activities and daily routines to remote working almost overnight (Wang et al 2021), among them social scientists, who resorted to digitized research techniques in order to continue to realize in-depth interviews, focus groups, and ethnography despite their inability to physically reach their research field and/or participants (Carreri and Dordoni 2020; Miller 2020; Lupton 2020; Russo and Minello 2021; Melis et al 2022). Furthermore, social scientists who have dealt with communication mediated by digital technology have discussed how the devices and platforms the researcher uses inevitably have an impact not only on the sensory experience of the mediated encounter, but also on the data produced during that encounter, thus influencing the production of social knowledge (Hine 2010; Lupton 2015; Pink et al 2015; Pink 2016).

In this paper I tried to develop a meta-reflection on the impact of "remote working", both on my study participants (a group of solo self-employed workers) and on my research methods and results. In other words, I tried to use ICT-mediated techniques as an opportunity to engage in a broader reflection on the research encounter, questioning the power imbalance between researcher/observer and social actor/observed (Bhattacharya 2008). By considering "remote working" and "remote interviewing" as two sides of the same coin, I tried to analyze first the impact of the former on the interviewed self-employed workers and then the impact of the latter on my data collection and results interpretation.

On the one hand, unlike smart working, which should facilitate a reconciliation between the work and private spheres due to the flexibility of the work schedule (Bertolini and Fullin 2021), I found that remote working exacerbated some characteristics of self-employment, such as the domestication of the work space (Bologna 2018) and the erosion of the boundaries between personal time and working time (Armano and Murgia 2013; Murgia and Pulignano 2019). This appears to lead to negative effects on both my interlocutors' work-life balance and productivity. Furthermore, due to the lack of social protection typical of self-employment, the realization of ICT-mediated job activities has introduced new layers of complexity for my interlocutors, including the difficulty of managing

periods of illness, finding new clients without attending social events, and stimulating creativity without constant immersion in the outside world.

On the other hand, I found that, as Hine (2010) suggests, digital techniques could become interrogators of traditional research methods, acting as a stepping stone for the construction of a collaborative research approach (Campbell and Lassiter 2014) based on a more egalitarian relationship between the researcher and the participants. In particular, an in-depth interview could be considered a joint production, in which hypotheses are contested, a plurality of purposes (of the observer, but also of the observed) are welcomed, and there is room for negotiation, and the uncertainty of results are considered part of the qualitative research process (Campbell and Lassiter 2014).

Furthermore, when analyzing data collected using digitized research techniques (Rogers 2013), it is useful to apply a theoretical framework that looks at ICT not only as a medium, but also as an agent in the construction of mediated communication (Ahlin and Li 2019). An ICT-mediated interaction should thus be conceived as a "collaborative triangulation" (Decataldo and Russo 2022) where the researcher-participant duo is enriched by the ICT that mediates communication and becomes a researcher-medium-participant trio. In this way, the negotiation of meanings and information that takes place between the researcher and their interlocutors unfolds (also) on the digital level and concerns the way participants choose to enter into dialogue with the interviewer. Thus, as I have tried to demonstrate, technology-mediated communication could be used to explore and make explicit the tension between the research questions and the experience of being interviewed (Ezzy 2010), the power shifts between the observer and the observed (Kvale 2006), and the emotional labor inherent in the research encounter (Hoffmann 2007).

Notes

1 Despite the expressed considerations, it should be noted that the digital divide (the disparity between the share of the population with access to the internet technology and those without) has persisted and that the COVID-19 pandemic has exacerbated pre-existing disparities. For further information on this sensitive issue, see Litchfield et al 2021.
2 Here I am referring to the COVID-19 outbreak in Italy, where the first case was diagnosed on February 21, 2020. The day after, schools were closed in the northern regions of Lombardia and Veneto. On March 8, a series of containment measures (such as remote working, remote learning, curfews, and other limitations of citizens' movement) were implemented by the government in an attempt to halt the spread of the SARS-CoV-2 virus.
3 In Italy, remote working was already regulated by 2017 (Law 81/2017). Nevertheless, it has been estimated that the percentage of the workforce working remotely rose from 1.2% (before the COVID-19 outbreak) to approximately 30% (during confinement periods) (Bertolini and Fullin 2021).
4 Throughout the national territory, self-employed workers are mainly concentrated in the metropolitan areas of the northern regions (Eurostat 2018), which also represented the epicenter of the first wave of the COVID-19 outbreak.

5 The metropolitan area of Milan represents an ideal site for research investigating the impact of the COVID-19 pandemic on self-employed workers, both because Milan is located in one the regions of the country that is home to the largest percentage of this workforce segment (Murgia and Pulignano 2019) and because it is the metropolitan area with the highest number of COVID-19 cases in Italy (as of July 12, 2021, according to Istat).
6 The interview quotations included in this publication have been translated into English, maintaining an adherence to the original meanings attributed by the interviewees as much as possible. To protect my interviewees anonymity, all names mentioned in the paper are fictional.
7 In Italy, lawyers belong to the category of "traditional independent professionals" (Borghi and Murgia 2019), meaning they are usually registered with a professional order. This registration, which has an annual cost, entitles them to some forms of social benefits and protections, such as paid maternity leave, but not necessarily paid sick leave.

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10

THE IMPACT OF COVID-19 ON POSTGRADUATE CLASSROOM-BASED RESEARCH

An African perspective

Rose Acen Upor

The COVID-19 pandemic has caused the largest disruption of education in recent history (McCarthy 2020; Ryan 2023) and it has also resulted in an unprecedented impact on research worldwide (Weiner et al 2020; Upor 2023). The impact of the pandemic on research in progress at the time of the pandemic and the ensuing real-time pandemic research challenges have become a topic for discussion and review in many academic circles. Several studies that have reported impact have been related to the biomedical sciences, life sciences, and health-related research in general (Harper et al 2020; Riccaboni and Verginer 2022; Weiner et al 2020) however limited studies have reported impact on humanities and social sciences research (Kleinman et al 2022; Otto and Haase 2022) or even more so, the impact on particular approaches to the investigation as in this case, classroom-based research.

Classroom-based research (CbR) has a long history in the investigation of language learning and teaching (Allwright 1984, 1987; Allwright and Bailey 1991). Historically, it has been used to study pedagogy with the belief that the context is the best location for drawing insights and understanding. Although it did not originate in language teaching research, CbR is not unique to language teaching. The narrow view of CbR focusing on pedagogy evolved with the expansion of the method from educational purposes to second language acquisition research which emphasizes the interactive nature of the classroom language ecology. Although the educational viewpoint of teacher talk is crucial to CbR investigation, it has been argued that the interactive aspect of classroom behavior brings forth a richer understanding of the language in use. Mackey and Gass (2005) compared CbR and research conducted in controlled contexts and they argue that CbR provides benefits that enable researchers to control and manipulate intervening variables. Their comparison emanates from the fact the CbR conditions may necessitate some form of control, however they

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acknowledge that increasingly, combined approaches are gaining popularity in the conduct of CbR. The most common data collection techniques used in CbR include observation and introspection. However, CbR has been conducted in a variety of contexts with different orientations to language teaching that require logistical considerations when administering the investigation. Apart from the equipment choices for data collection procedures, one major logistical concern is the physical environment for data gathering which is crucial. Mackay and Gass (2005) argue that the data gathering situation may require ascertaining seating arrangement, quality of acoustics, writing implements, illumination, temperature, and scheduling of breaks, as these elements may impact the data collection. Other issues to be addressed when conducting CbR are dealing with nonparticipating parties; debriefing participants; accessing information pertinent to the investigation, e.g., test scores, attendance where necessary; ensuring confidentiality and minimizing disruption; and considering the instructional setting. These observations highlight the complexity of CbR and emphasize the importance of meticulous planning. However, Mackey and Gass (2005) indicate that flexibility is important since carefully designed studies rarely proceed according to plan. Some unforeseen events and problems arise from various sources that would require adaptation and quick thinking.

The nature of CbR as a method brings research participants into proximity with each other, which according to COVID-19 protocols may endanger their well-being if not properly observed. School closures were the first immediate action taken by governments across the globe in a bid to control the spread of COVID-19 (McCarthy 2020; Upor 2021). Similarly, closures hit higher learning institutions (HLIs) where most research activities are implemented. The impact on research indicates record-high pauses and modifications to studies. Riccaboni and Verginer (2022) confirm that fields that were not directly related to the pandemic faced displacement since public and private incentives diverted resources toward research areas strictly related to the pandemic emergency. Home administration and virtual monitoring were favored in health-related studies to minimize participant risk of COVID-19 infection (Weiner et al 2020), subject headings shifted to COVID-19-related topics (Kaaya et al 2021; Riccaboni and Verginer 2022), there was an influx of research publication due to increased writing times during closures (Harper et al 2020), and there was a shift to virtual means for fieldwork and remote data collection (Wolf et al 2022). Therefore, drawing from the experiences of the effects of the pandemic on general research methods, this chapter shall aim to describe an African perspective on postgraduate classroom-based research by linguistic majors. It shall discuss the dynamics of classroom-based research in light of the pandemic restrictions and adherence to restrictions.

Classroom-based research considerations and the pandemic dynamics

Many countries reopened schools with control measures in place to counter any risks of contact that could lead to probable transmission of the virus (Tupper

and Colijn, 2021). A range of mitigation steps was taken in line with the protocols of prevention for the spread of the virus. Widespread physical distancing measures were maintained even after the reopening of educational settings in most African countries. It is reported globally that with the reopening, few or no new cases of infections were observed. Examples of such cases were found in France, Australia, and Ireland (Heavey et al 2020; Fontanet et al 2021; Macartney et al 2020). Contrary to this, reports of large breakouts of new transmission cases were reported in countries such as Israel and the USA. Concerns remained regarding a possible transmission to secondary contacts, i.e., parents, teachers, neighbors, etc., by having students together in the classroom setting or whether the presence of students accelerated the spread of the virus in the community (Tupper and Colijn 2021).

The Tanzanian Government through its Ministry of Health, Community Development, Gender, Elderly and Children issued guidelines on preventive measures against COVID-19 that were to be implemented following the reopening of the education system (Ministry of Health, Community Development, Gender, Elderly and Children 2021). The statement written in Swahili for wider coverage had four distinct sections: (1) preventive measures to be taken before the reopening; (2) handling of suspect cases of infection; (3) transportation guidelines; and (4) learning environment. The guidelines stretched from the installation of handwashing facilities to routine inspection of institutional surroundings, continual health information sharing on preventive measures to the provision of psychosocial support, emphasis on wearing masks to emphasis on maintaining physical distance within the school surroundings. The educational institutions were also advised to adopt shifts in cases where classrooms had over the average number of students allowed in the facilities, make affordances for special needs students, and train staff to detect symptoms in infected students (Ministry of Health, Community Development, Gender, Elderly and Children 2021). Unfortunately, there were neither provisions for how research was to be handled nor the treatment of visitors within the educational surroundings mentioned. A probable explanation would be that whoever was to be within the surroundings was required to adhere to the guidelines.

One crucial area for understanding the dynamics of CbR is the ecology that would allow for a researcher to successfully collect data in the setting. The national benchmark in Tanzania for class size is 45 students for primary education and 40 students for secondary education. Due to the scarcity of facilities in some areas across the country, there are disparities in class sizes between schools in urban and rural settings (The Southern and Eastern Africa Consortium for Monitoring Educational Quality 2011). Primary schools use group desks of two students per desk depending on the availability of the resources. While there are reports of disparities at lower education levels, the Tanzania Commission for Universities (2019) provides guidelines for space requirements for physical facilities. The guidelines state space requirements for the following facilities to not exceed the numbers indicated in the brackets: (1) seminar rooms

(10); (2) lecture rooms (50); (3) lecture theatres (300); and (4) assembly hall (can exceed 300 students). All specifications support physical distancing since spacing provision ranges from $1m^2$ to $3m^2$ per student depending on the size of the room and the number of students allowed per room and if the facility is for postgraduate students or undergraduate students. This section has raised important aspects for successful CbR for consideration during the height of the pandemic. It draws examples from Tanzania to chart out the minimum standard requirements for classroom settings. Moreover, it explores the preventive measures set up in place either through government guidelines to the public or the WHO standards that have been interpreted for the public to adhere to and eventually curb transmission of the virus.

Efforts for continual research activities during the pandemic: An African perspective

The pandemic is said to have prompted research methods that adapted to the restrictions and regulations despite evidence of limited research activities across the globe (Sachan 2020; Murray 2020; Vindrola-Padros et al 2020). Remote data collection was viewed as the most feasible means of research while qualitative empirical research was regarded as the most hampered during the period (Otto and Haase 2022). Reports of impact have been conveyed in health-related research (Fox et al 2022), social scientific research (Otto and Haase 2022), language research (Kleinman et al 2022), and research methods and approaches (Strachan 2021) to mention a few. However, contextualized experiences are limited to further the understanding of the impact of this far-reaching pandemic.

Kaaya et al (2021) reported on efforts to preserve educational access, research, and public service relevance at the University of Dar es Salaam during the pandemic. In their paper, they detailed a recovery and operational plan that was administered after the University reopened on June 1, 2020. The plan indicated adjustments that not only allowed for safeguarding staff health and well-being but also ensured that the university proceeded with its core functions. Their review indicates that the University supported multidisciplinary-applied investigations into alternative indigenous medicines to treat COVID-19 symptoms. On one hand, the University-funded research is geared towards social and health interventions, human behavior, business and financial aspects, prevention, and screening of the virus. On the other hand, it issued internal guidelines for handling postgraduate study, where online supervision was introduced and encouraged among staff and students. It is assumed that the conditions under which research was conducted were indirectly covered by the government guidelines on preventive measures during the pandemic. Just as in Tanzania, Dawood and Van Wyk (2021) report that the pandemic-imposed restrictions on movement demanded a shift to online interaction in South Africa. The study indicates that inequalities manifested in postgraduate research posed significant challenges that resulted in policy shifts being instated to

safeguard students as well as protect the quality of their research. Data collection was performed using online resources such as WhatsApp, Zoom, and Skype amid concerns of digital exclusion and locating participant consent. Mudzi and Mudzi (2022) report on several institutions providing guidelines, letters, and commentaries on guidance for postgraduate research during the pandemic. The communications were issued to guide research conduct during the lockdown, mitigation of the impact of the pandemic on research, and best practices for academics and postgraduate students. The communications came amid challenges that ranged from the uncertainty of the security of online platforms to the digital divide, from the difficult engagement of the community to the recruitment challenges, from funding obligations of students to the difficulty of meeting timely outputs. The disruption caused by the pandemic and its ensuing shift to online resources has led to major concerns about the handling of research. Dawood and Van Wyk's (2021) study indicates that research ethics suffered the most during the pandemic. There were also concerns about online security, how to protect the confidentiality of the participants, and supervisor-student relations. It was evident that the research and supervision were not prepared for online supervision and research.

These accounts from South Africa and Tanzania detail the frantic activities of higher learning institutions to ensure the continuity of research for postgraduate students and staff alike. However, it raises critical issues that engulf the efforts of continuity. The research space not only demonstrates the challenges involved in data collection but also indicates how research transcended to an acceptable online format. Besides, there are several studies executed during the pandemic across Africa that highlight various methods. Table 10.1 below presents a selection of pandemic-related studies that examined the research space during the pandemic in an African context. Almost all the studies involved remote method of data collection.

Contextualizing postgraduate field research: An exploration of CbR during the pandemic

The evolution of CbR from a strictly classroom interaction analysis to ethnography has been well documented. However, it has been noted that fully-fledged ethnographies of language classrooms remain relatively rare and the impact of sociocultural perspectives on the methodologies used by classroom language researchers has not been fully realized (Mitchell 1996) even in the case of a pandemic, it stills brings into question whether the same can be discerned from online Zoom meetings or other digital resources when used for teaching. For this chapter, an exploratory study using an online survey was administered to 20 postgraduate students at the University of Dar es Salaam. The study purposively sampled Master's and doctoral students enrolled in linguistics programs who selected CbR as a methodology for their dissertation research. The duration of their research ranged between less than one month to two months for

TABLE 10.1 Summary of select pandemic-related studies done in Africa

Study	*Objectives/Questions*	*Approach/Design*	*Methodology/Data collection*	*Challenges*
Komolafe et al (2021) Nigeria	Assess the acceptability, appropriateness, and feasibility of virtual space in strengthening the research capacity in Nigeria	Descriptive cross-sectional design, 496 researchers participated in the webinar, 424 participants responded to the online questionnaire	Online questionnaires, webinar	• Poor internet connectivity • Cost of data
Hasnine et al (2022) Egypt	Assess the adaptation of AL-TST active learning model in a hybrid classroom in Egypt	Quasi-experimental research design, 76 undergraduate students	Hybrid classroom, WhatsApp, university e-learning system	• Low student engagement • Inadequate support to on-site and online students
Sokhulu (2021) South Africa	Examine Master's students' experiences of using digital technologies during the COVID-19 pandemic	Case study design, five Master's students	Phone call interviews, Zoom focus group discussion, online questionnaires	• Unsystematic introduction to digital technologies as a barrier of usage
Naidoo (2020) South Africa	Examine postgraduate mathematics education students' experiences of using digital platforms for learning within the COVID-19 pandemic era	Exploratory study, 31 postgraduate mathematics education students	Emails, three interactive online workshops (via Zoom), two online discussion forums (Moodle and WhatsApp chats)	• Difficulties in using digital platforms • Exposed to Zoom during the pandemic • Digital divide
Upor (2022) Tanzania	Examines undergraduate preservice English language teachers' digital literacy practices to establish whether their digital skills predict effective integration into language teaching and learning after the pandemic	Cross-sectional study, 410 undergraduate preservice English language teachers	Online survey, WhatsApp	• Digital divide • Limited exposure to digital resources for language learning/teaching

Study	*Objectives/Questions*	*Approach/Design*	*Methodology/Data collection*	*Challenges*
Upor (2021) Tanzania	Examine secondary school students and teachers use of technology during the COVID-19 pandemic	Exploratory design, 127 secondary school students and 33 language teachers	Self-reported questionnaires, face-to-face interviews (observing social distance)	• Digital divide • Cost of data and low connectivity • No gadgets
Chirinda et al (2021) South Africa	Examine the response of mathematics teachers in South African public secondary schools to emergency remote teaching during the COVID-19 lockdown	Exploratory and descriptive design, 32 secondary school mathematics teachers	A Google-generated open-ended questionnaire, follow-up telephonic interviews, emails WhatsApp	• Difficulties in implementing digital teaching • Unstable network connectivity • Uncertainty of the impact of WhatsApp on mathematics learning
Skhephe and Matashu (2021) South Africa	Explore how accounting teachers can embrace technology use during and after the COVID-19	Case study, ten accounting secondary school teachers	Online semi-structured interviews	• Personal technological device usage is hindered by the school constitution
Olatunde-Aiyedun et al (2021) Nigeria	Examine the adequacy of ICT infrastructural facilities, implementation of policies, and literacy levels of staff and students in the universities during the COVID-19 lockdown	Descriptive design, 67 undergraduate students and 56 lecturers	Online questionnaire	• Disruption of teaching calendar and research programs • Shortage of manpower
Salifu and Abonyi (2022) Ghana	Examine how university teachers managed large student numbers in the virtual environment during COVID-19	Phenomenological design, 12 university teachers	Semi-structured open-ended interviews on Zoom platform, virtual classroom observations	• Lack of virtual teaching experience • Frequent unexpected electricity cuts • Unstable internet connectivity • Low learner engagement

Master's students and from three months to over six months for doctoral students. Their subfields of focus were mainly second language acquisition and pragmatics. The data was collected during the diminishing COVID-19 period where most postgraduate students were either in the field or away from campus thus an online method was used to collect data.

The results from the exploratory study reveal that COVID-19 had an impact on the processes of CbR. First, there was uncertainty as to whether they would be received and granted entry to the field by the school head teachers. For some access was denied and they had to seek alternative locations while other students made decisions to collect data from areas that they perceived did not pose a threat for transmission of the virus. Second, the postgraduate students had to decide whether they would be able to maintain and observe the tenets of CbR. Where the field site was amenable to receiving them, they proceeded to the next stages of the study as expected. In cases where location, duration, and participants were not responsive to the investigation, the postgraduate students decided to use secondary data collection methods first, to complement their primary data, and second as a solution to where restrictions could not afford them access. Despite challenges in progressing with the planned CbR, all of the postgraduate students indicated that they adhered to some form of preventive measures against transmission and infection of the virus and it also was an integral part of their data collection processes. Below are selected excerpts presenting the views of the postgraduate students on the reasons that made them choose to proceed or not proceed with the field research. Not only do these excerpts confirm the absence of clear guidelines for data collection and the steps taken to address it but they also express how the researchers' perception of pandemic severity influenced their decisions to proceed with their investigations.

Table 10.2 presents six axial themes that revolved around how the postgraduate students carried out their investigations in the field. The responses indicate that precautionary efforts against the transmission of the virus and self-perceived low severity of infections were overriding factors that influenced the data collection processes. The data gathering situation requirements for CbR focused more on seating arrangements and less on other implements as listed by Mackay and Gass (2005). Issues of postponement, restriction, recruitment, and obligation also played a significant role in whether the students proceeded with their investigations. Additionally, the postgraduate students reported using secondary data collection techniques such as self-administered questionnaires, audio recordings of the classroom sessions, video recordings, elicitation, face-to-face interviews, and focus group discussions. According to Mackay and Gass (2005), CbR requires a meticulous amount of preparation since other secondary issues in the environment can cause disruption. Figure 10.1 presents the range of adaptive decisions that resulted in adjustments to the planned CbR data collection process.

From Figure 10.1, it is evident that the student researchers followed standard protocols for prevention as stated by the WHO such as physical distancing, washing hands, and wearing masks among other means they resorted to in the

TABLE 10.2 Excerpts presenting views of postgraduate researchers

*Participant**	*Excerpts***	*Category*	*Theme*
PG 1 *F, M.A. (Linguistics)*	"… Due to the presence of different ways on how to protect and prevent COVID-19 like wearing mask, distance between conversants as well as greeting by not touching each other, I proceed by following them (preventive measures) …"	Protective gear	**Precaution**
PG 2 *F, M.A. (Linguistics)*	"… I proceed with my study during the pandemic because I was aware of the recommended preventive measures in response to the COVID-19. Therefore I had nothing to fear since I could use all the necessary personal and interpersonal-protective equipments. Also, I ensured safety and conducive environment during the whole process of data collection at the field …"	Protective gear	
PG 3 *M, PhD (Linguistics)*	"… By considering all precautions on Covid 19, the data collection went on smoothly …"	Safety measures	
PG 3 *M, PhD. (Linguistics)*	"… students wondered why I wore a '*barakoa*' (mask) to class and yet there was no COVID …"	Protective gear	
PG 4 *M, M.A. (Linguistics)*	"… Observation of COVID 19 safety protocols …"	Safety measures	
PG 1 *F, M.A. (Linguistics)*	"… teachers were afraid of us because we wore masks. The students did not care …"	Protective gear	
PG 5 *F, M.A. (Linguistics)*	"… I conducted my study in the village. The pandemic in the village was not much spread as it was in town. So, there were no restrictions which caused me to stop collecting data …"	Self-perceived low severity	**Non-restrictive**
PG 6 *M, PhD (Linguistics)*	"… I proceeded with my study because at the time l had the permission there was no lockdown. I also had to find an assistant researcher because of limited time and l had a lot to do …"	No lockdown	
PG 7 *F, M.A. (Linguistics)*	"… There were no restriction, thats why I managed to proceed my study …"	No restrictions	
PG 8 *F, M.A. (Linguistics)*	"… Decreasing of the speed of the pandemic made me to proceed with data collection …"	Self-perceived low severity	

*Participant**	*Excerpts***	*Category*	*Theme*
PG 9 *F, M.A. (Linguistics)*	"… proceeded with my study since I did it during the post pandemic period, where there was no too much tension about the pandemic and participants had taken all the precautions …"	Self-perceived low severity	
PG 10 *F, M.A. (Linguistics)*	"… There were no any restrictions by the time I collected the data between April and June 2021 …"	No restrictions	
PG 11 *F, M.A. (Linguistics)*	"… The moment I was collecting my data in April 2021 the situation of Covid-19 was not tense as it was in 2020 so, participants were available since most of the universities were opened …"	Self-perceived low severity	
PG 12 *M, PhD. (Linguistics)*	"… nobody was wearing masks so I did not wear one …"	Self-perceived low severity	
PG 13 *M, M.A. (Linguistics)*	"… Avoidance of the risks of contracting the Corona virus and another reason was psychological confusion …"	Avoidance	**Postponement**
PG 14 *M, M.A. (Linguistics)*	"… Fear to infections …"	Fear	
PG 15 *F, M.A. (Linguistics)*	"… Fearing the impact of this pandemic because most of people in and outside the country die due to covid 19 …"	Fear	
PG 17 *F, PhD (Linguistics)*	"… Private schools restricted guests to their classes …"	No access	**Restriction**
PG 3 *M, PhD (Linguistics)*	"… I was told there was no space in the class instead use break time and sit in open air …"	No access	
PG 18 *M, M.A. (Linguistics)*	"… Since it was a qualitative research data was collected from small number of participants. If it was the quantitative study may be the study would not have proceeded following the pandemic safety protocols …"	Methodology	
PG 19 *M, M.A. (Linguistics)*	"… I focused on other ways of data collection …"	Methodology	

*Participant**	*Excerpts***	*Category*	*Theme*
PG 12 *M, PhD (Linguistics)*	"… People were hard hit with post covid economic uncertainties, hence some were willing to participate in the study if there were some kind of compensation …"	Participation/ compensation	**Recruitment**
PG 20 *F, M.A. (Linguistics)*	"… The study area was conducive for my research topic, that made me proceed with my study …"	Location	
PG 13 *M, M.A. (Linguistics)*	"… Abiding to study leave conditions …"	Obligation	**Obligation**
PG 2 *M, M.A. (Linguistics)*	"… I aimed to proceed with my study to ensure that I complete my M.A studies on time …"	Timing	

Key: * *F* – female, *M* – male; ** These are unedited direct quotes of the views of participants

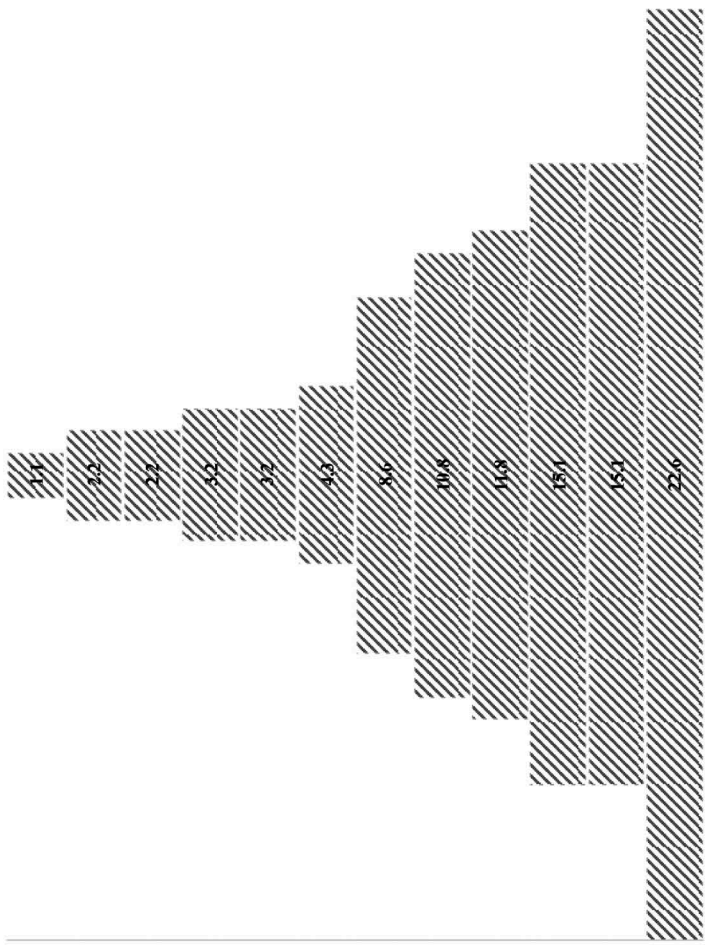

FIGURE 10.1. Adaptive adjustments made to the data collection

field. Maintaining physical distance among participants of the study was predominant and it was also indicative of the change of seating arrangement to maintain distance. It was interesting to note that the postgraduate students recruited persons whom they regarded as low risk to collect data on their behalf. Their definition of a low-risk research assistant was based on the definitions given by WHO of nonelderly persons having minimal risk of fatality or severity from the virus. Unfortunately, it was not exactly clear how the assistants would have collected data remotely or as a secondary method, especially in CbR. Generally, it suffices to confirm that CbR followed an adaptive path since elements within the field required researchers to rethink the methods in light of the situation. Figure 10.2 presents a flowchart to illustrate the processes. A close scrutiny of the flowchart presents four distinct stages in the CbR data collection as practiced by the study participants. These

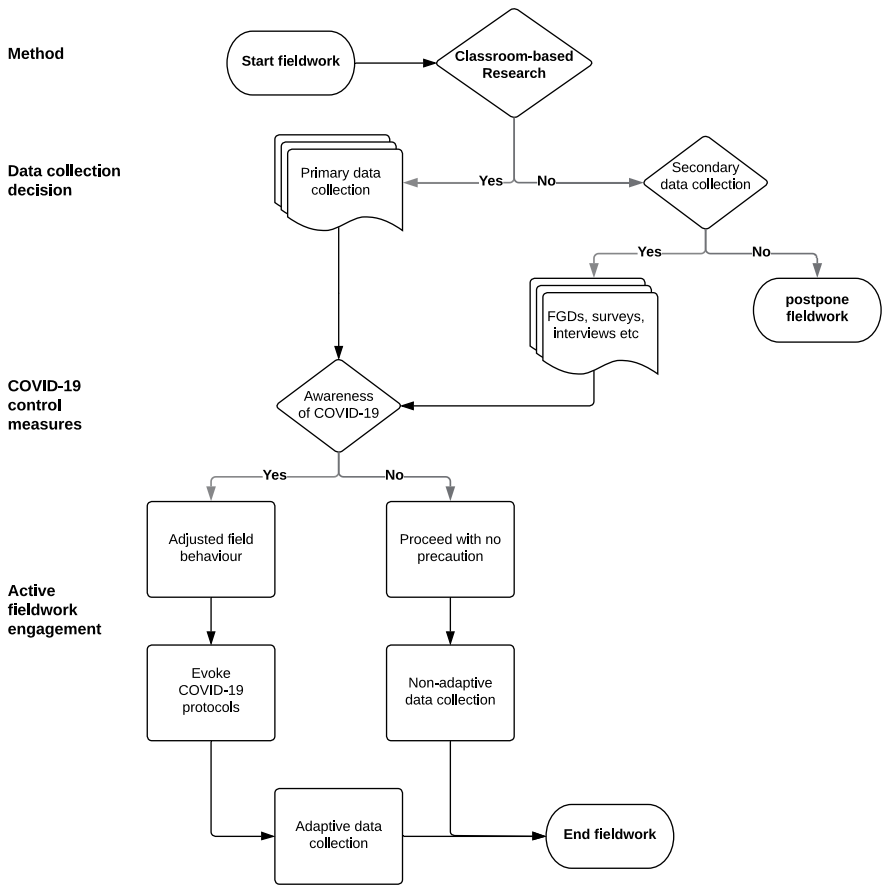

FIGURE 10.2 Adaptive classroom-based research decisions and processes during the COVID 19 pandemic

stages comprise of the method selection, decisions on data collection procedures, prevention of possible risks due to COVID-19, and the active fieldwork engagement. Method selection is normally done prior to entering the field as it has been indicated in the flowchart. It is at this point that the researcher is then faced with the decision of proceeding with the primary CbR data collection procedures or choosing to use secondary methods. The primary data collection procedures will reflect on the type of language data that they intend to collect and whether the proximity to their study participants may pose risks. Ellis and Barkhuizen (2005) identify three types of language data that can be collected in a classroom. These are performance data (measures of reaction times, non-verbal measures, grammaticality judgement test, etc.), samples of learner production (naturally occurring data, elicited data, experiment-elicited data, etc.), and verbal reports (self-reports, self-observation, self-assessment, etc.). All these types of data require some form of proximity between the researcher and their participants. Secondary data collection methods would include other data collection procedures that are not primarily CbR methods such as interviews, surveys, and focus group discussions. Where a decision on methods cannot be reached the researcher may consider postponing fieldwork.

If a researcher chose to proceed with either primary CbR methods or the secondary research methods, the study has revealed that they decide on whether to engage or not to engage their awareness of COVID-19 control measures. For those who chose to apply a certain amount of precaution based on their knowledge of COVID-19, we noted adjustments in their fieldwork behavior and their need to evoke COVID-19 protocols (See excerpts PG 1–4). Comparable adjustments to the protocols for research are reported in several studies (Penfold 2024, this volume; Abaunza 2024, this volume). For those who did not wish to engage any precaution measures, they chose to proceed with their data collection as planned (See excerpts PG 5, 7, 8, and 12). Those who chose to adapt engaged various protocols such as social distancing, masks, and washing hands. They also requested their study participants do so as well. This flowchart presents the process of an adaptive classroom-based research sequence. It is intended to present the complex process of doing research in a disruptive time such as the COVID-19 pandemic while illustrating a sequence of decisions and steps in a comprehensible framework. Although the flowchart may present an uninterrupted process of data collection, it is important to note that there were exceptions among the postgraduate students. These exceptions included the use of both primary and secondary data collection procedures. Also the flowchart cannot account for any fraudulent or unethical research behavior that may emerge during data collection. Kerr-Cumbo et al (2024, this volume) identify three adaptive strategies: 1) the "wait-and-see" strategy; 2) minor modifications strategy; and 3) major modifications strategy, and where projects were untenable, they were abandoned for more workable alternatives. Conversely, this flowchart presents the view that "wait-and-see" strategy and major modifications were not an optimal choice for postgraduate students. Indeed, cases of

abandonment/postponement were reported in this study (See excerpts PG 13–15). Where ethical challenges were observed in other studies, they were mostly associated with the process of attaining permits to proceed with research activities and/or concern for the safety and well-being of the study participants (Kerr-Cumbo et al 2024, this volume; Penfold 2024, this volume; Ryan et al 2024, this volume).

Towards a holistic view of the impact of COVID-19 on research processes among postgraduate students

Tanzania presents a very unique picture when it comes to how it managed the COVID-19 pandemic. During the early period of the pandemic, the Tanzanian government implemented various WHO-recommended measures and the Ministry of Health issued guidelines, however the government did not implement a lockdown as other nations did. The reasons for this were the restricted public access to health services and citizens' work, and households' inability to afford basic needs pushing more people into poverty (Mfinanga et al 2021). Moreover, President Magufuli's stance on COVID-19 during that period also could have contributed to the uniqueness of Tanzania. President Magufuli made a premature declaration of the end of COVID-19 and expressed skepticism in regards to COVID-19 vaccines (Makoni 2021). On a global level, Garen et al (2021) reported that between March 2020 and February 2021, schools were fully closed for an average of 95 days. The longest closures were situated in Latin America and the Caribbean region. The report further indicates that the Eastern and Southern Africa region was the third most affected with an average of 101 days. However, Tanzania experienced one of the shortest school closures, approximately 50 school days between March 2020 – June 2020. This meant that schools were fully opened and accessible to the public in line with the general guidelines that were provided by the Ministry of Health. With a close review of the study, it is most probable that the research behavior of the postgraduate students was partly influenced by the circumstances surrounding the rejection of a national lockdown, early opening of schools, the declaration of the end of COVID-19, and refusal of its vaccines by President Magufuli.

The scope and nature of the impact of the pandemic on postgraduate research have revealed disconcerting effects in the African context (Bob et al 2021; Dawood and Van Wyk 2021; Naidoo 2020; Mudzi and Mudzi 2022). These effects range from the psychological effects of the pandemic on the postgraduate study to ethical considerations of research and to field-based research in itself. Among the major ethical matters of concern was the possibility of postgraduate students being tempted to resort to unethical or fraudulent research activities because of the COVID-19 restrictions (Mudzi and Mudzi 2022), and ethical dilemmas in online research that range from privacy, informed consent, digital divide, hacking, potential harm, and online privacy (Dawood and Van Wyk 2021). Drawing from the studies in Table 10.1, it is

clear that the African postgraduate study landscape leaves much to be desired in addressing the effects brought about by the pandemic. However, it must be noted that these effects are not idiosyncratic to the African landscape. Studies have shown that physical distancing halted/hindered data collection (Dong et al 2022), cancellations of sessions intended for data collection were experienced in some cases (Rafat and Khan 2021; Pyhältö et al 2023), and there were also alterations made to research design as well as time extensions and postponement of research (Hofmeyr et al 2021); but on a more positive note, there was also opportunity to publish and analyze data from previous experiments (Aydemir and Ulusu 2020). Through this review, it has become much clearer that CbR as a method was affected by the pandemic and this can be generalized for other traditional designs selected by various researchers. The adaptive measures taken by the postgraduate students indicate an awareness of the pandemic and its related measures created space for precaution where there were restrictions and even where none were taken by the researchers. All other effects mentioned earlier are shared even in CbR, however one area that could be attributed to the recruitment of participants and the socioeconomic circumstances is the willingness of participants to take part in a focus group discussion due to some form of compensation (see excerpt PG 12) being promised. This portrays the willingness to be recruited in exchange for compensation regardless of the prevailing pandemic situation. There was also no exception when it came to meeting timeframes for funded students. Strict timeframes for the completion of studies were a push factor for many postgraduate researchers going into the field. Wadgave and Khairnar (2021) indicates concern that pandemic restrictions may tempt postgraduate students to resort to unethical or fraudulent research activities. These unethical choices would include data manipulation or fabrication to complete their research, and as a result, compromise the integrity of their investigation. Despite this concern raised by Wadgave and Khairnar (2021), a more disconcerting matter would be the integrity of the "traditional" research design selected by the postgraduate researcher. CbR as a method has well-defined procedures for engagement in the field. Although secondary methods could be used depending on the area of focus, deviation from the primary methodology may be unsettling. In this study, none of the participants were ready to change the study design or the study objectives to accommodate the restrictions brought up by the pandemic. They would rather change the sample size and study location, or even employ a low-risk research assistant. This choice can be attributed to the strict procedures for research proposal approval at the University, but the issue remains as to whether the end product is an actual result of the intended CbR process. Unlike this scenario, Penfold (2024, this volume) reports of a sequence of ethics applications required for her to progress with her studies following any adjustment that she performed to her research methodology. This is indicative that the impact of ethical considerations on research methods as a result of the pandemic is relative to the institutions, and oversight plays a significant role in the modifications made by researchers.

Conclusion

While the chapter aimed at studying research methods affected by the pandemic and their ensuing challenges, the chapter also sought to go beyond quick fixes for methods and raise issues that are more fundamental to research in the African context during disruptive times. Several studies on research during the pandemic have confirmed pivotal issues that cannot be ignored. These include: unethical or fraudulent research activities because of COVID-19 restrictions (South Africa) (Mudzi and Mudzi, 2022); ethical dilemmas in online research (South Africa) (Dawood and Van Wyk 2021); psychological stress (Ghana) (Oti-Boadi et al 2021); challenges of digital pedagogy (South Africa, Nigeria) (Naidoo, 2020; Komolafe et al 2022); reliance on distractive online communication tools (South Africa) (van den Berg and Mudau 2022); and administrative, supervisory, and quality issues in postgraduate research (South Africa) (Bob et al 2021). From the chapter's disposition, three key conclusions are made; first, the results from the exploration of CbR as a research method concerning its use during the pandemic imply that research designs can be adjusted and adapted to prevailing conditions. What is brought into question is the integrity of research designs, especially where systematicity is crucial in reaching the desired outcomes. Data collection techniques and sampling techniques are often linked to particular research designs and approaches. Although mixed methods research (MMR) may afford a plausible solution in this case, in most cases the choice to change research design or even weather out the pandemic seems most desirable. Analogous trends of adaptations, innovations, and modifications are reported by various researchers (Abaunza 2024, this volume; Calvo et al 2024, this volume; Najmah et al 2024, this volume; Penfold 2024, this volume). Abaunza (2024, this volume) also questions whether the evolution of epistemological assumptions and methodological decisions can be accepted as "good" research. However, he argues that the results of this evolution may provide new possibilities and ways of conducting research in a more connected world.

Second, there was a paucity of provision of institutional guidelines for the conduct of research in terms of ethics and field-based investigation. It can be contended that just as systematicity is inherent in research processes, in the same manner external processes before field research need to adhere to a certain set of principles. Drawing examples from the continent reveals the limited research guidelines and dependence on general control measures developed by the WHO and communicated by the government. This leaves its interpretation open, which subsequently may not necessarily reflect an acceptable level of systematicity in investigations on the ground. Disruption of research by a pandemic requires meticulous management and well-defined guidelines for postgraduate students both off and on the field. Necessary provisions in the guidelines must take into consideration both the well-being of the researcher and that of the respondents. Moreover, clear ethical boundaries must be aligned whether a choice is made of either remote data collection or field data

collection. Rahman et al (2021) insist that willingness of researchers to adapt during the pandemic should address questions of safety of space and time availability with possible contingency measures (Calvo et al 2024, this volume).

Third, this chapter confirms the notion of pandemic-related research methods (Otto and Haase 2022) following the challenges faced by postgraduate students in their investigations and the adaptations that they had to make in line with the pandemic-imposed restrictions. As mentioned in the first conclusion, the characterization of pandemic-related adaptations is important to not only maintain the integrity of research methods but also for the promise of acceptable results. Nunan (1991) and Mitchell (1996) indicate issues that CbR seeks to address with key methods being observation, introspection, and interaction between key variables such as the learner, the teacher, and the environment. This study confirms that the first two variables remain intact in pandemic-related studies and the third variable, the environment and its interactions, becomes the center for adaptations and adjustments for data collection. Subsequently, these adaptations and adjustments may also influence the behavior of the human variables in the study. A similar argument is made by Abaunza (2024, this volume) of the configurations of roles played by the researcher and their informants which render the data collection process situational. In his study, he reports of the impact of COVID-19 on the willingness of participants and their expressive nature being compromised.

In conclusion, postgraduate student CbR has demonstrated the impact of the COVID-19 pandemic and with it, has identified tangible impact to the methodology. However, a more comprehensive investigation is needed to synthesize the impact of other types of methodologies to come up with a body of knowledge of emergency research methods, approaches, and procedures. This body of knowledge must include ethical considerations to safeguard the integrity of future investigations. Where there are limitations in higher education governance on the continent in developing policies and guidelines for pandemic-related research, institutional efforts must be made to articulate protocols and procedures for minimal disruption of research and the desired research volume.

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11

REFLECTIONS ON METHODOLOGICAL RECONSIDERATIONS AND ETHICAL PROCEDURES OF A POSTDOCTORAL RESEARCHER

Evelyn Penfold

My journey starts with my doctoral work in which I explored elementary teachers' enactments of mathematics policy in England. One of my findings was that teachers may perceive policy and/or a textbook as sources of mathematics knowledge. My ten years of teaching mathematics to preservice elementary teachers also provided many anecdotal experiences of students' attitudes and their engagement with their developing understanding. The aim of my postdoctoral research was to explore preservice elementary teachers' perceptions of their mathematics development within their final year of university and again within their first year of being qualified and responsible for their own class. I was excited by the idea of creating a framework that outlined the effect of professional development on preservice/qualified teachers' developing mathematics understanding. This work had the potential to inform preservice teachers, university-based educators, class teachers, and school-based mentors of the ways that mathematics knowledge is learnt and applied by students and newly qualified teachers.

Even without a pandemic, it is difficult for early career researchers to navigate their new role and learn more about their discipline, the institution, and their peers (Herman et al 2021). Networking underpins this navigation and enables new colleagues to learn and become established as they develop professional relationships within and potentially beyond a group of their peers. As an early career researcher, networking is important for postdoctoral fellows' development and productivity (Chen et al 2015). Social capital is gained when a colleague is known and recognized as a faculty member within an institutional group (Bourdieu 1986). Being a new faculty member at a university whose campus was closed was a significant factor to the trajectory of my initial and subsequent research aims. My lack of social capital was evident through my limited capacity to engage with colleagues and be recognized by participants,

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which required networking within an online environment. As I was newly arrived in Canada from England, networking was particularly important for me and required flexible and persistent approaches. Within this autoethnographic chapter, I analyze the events of my two-year-long postdoctoral fellowship, focusing on my journey as an early career researcher.

Initial and subsequent considerations of my research design

My research journey involved a tranche of modifications to my research aims and several ethics applications, which led to a delayed start to my research, recruitment issues, a different, and smaller sample of participants, and a reduced window for data collection. While my topic of interest, elementary mathematics teaching, remained intact it was necessary to move to an unfamiliar means of data collection – the online survey. My naivety and panic affected my survey design, which I considered user friendly in order to reflect my understanding that teachers, already busy individuals, were working in pandemic-enforced, unfamiliar circumstances. I anticipated that the online survey would act as a precursor to an interview by evoking teachers' reflections of their mathematics knowledge and professional development. Hence, the survey was restrictive in terms of the opportunity teachers had to examine and then describe their experiences. Simultaneously, I was over-ambitious in my expectations of the number of teachers who would volunteer to be interviewed.

Changes that are made in response to a situation such as the pandemic enhance the validity of a research study (Kobakhidze et al 2021). I strove to conduct reliable and valid research in which the data collection and analysis addressed and accurately answered the research questions, as recommended by Mason (2002). Indeed, it would not be prudent to reflect on my experiences if there was any possibility that the study was not reliable and valid. Not only would there be implications for academic papers, it would be disrespectful to the teachers who participated in my study. Nevertheless, pandemic-related constraints affected my research design, redesign, methodology, and findings.

Reflections and learnings from my doctoral journey

I conducted semi-structured interviews during my doctoral research as they played to my strength of engaging with others. I utilized a conversational approach in which the participants and I shared experiences. I used my interview questions as an outline of topic coverage and employed what Kvale and Brinkmann (2009, 130) refer to as "judgement and tact" to decide which questions I asked, the order in which I asked them, and which responses to pursue. I was able to establish credibility by describing my experiences as a teacher and I portrayed my empathy when discussing others' experiences.

I conducted a thematic analysis in which themes emerged from the data. Using a qualitative software package had been unsuccessful as I failed to

capture the bigger picture of responses due to the narrow gaze upon one participant at a time. I created over 700 codes, many of which related to a similar point. I discovered that my analytical strength was reviewing large amounts of data by spreading out the physical transcripts, identifying a pertinent topic, and then scanning the others for a similar topic. The next step involved a systematic process in which I copied and pasted the teachers' responses from the transcripts into a table using Microsoft Word. As the table developed my process of coding became more robust. This higher level of reading enabled me to create themes by recognizing "topics that recur again and again" (Bryman 2016, 586). There were several components within my theoretical framework (policy enactment and social constructionism theory) that I drew upon in order to focus my analytical discussion of the data. A significant amount of time and effort were invested in these analytical processes. However, the learning journey proved worthwhile in learning, practically, how to code data and use a theoretical framework as an analytical lens through which I examined my findings. My thesis was reliable and valid and contained rich discussion and theoretically informed conclusions.

The postdoctoral fellow research plan – created prior to the pandemic

The timing of what would become known as version one of my research plan was pertinent for a number of reasons. I had just passed my VIVA exam and was working on the minor revisions set by my examiners. I wanted to continue exploring teachers' perceptions regarding mathematics teaching. As I had completed my doctoral work on a part time basis, while working full time, the idea of solely conducting research was appealing. The position that I secured was based in a research centre whose focus was teacher education and development. On a personal note, the position offered my husband and I the opportunity to fulfil a dream of moving from England to Canada.

In terms of design it made sense to repeat the qualitative methodology and the analytical processes used within my doctoral research within my postdoctoral study. I replicated the sample size of 30 participants, which is an optimum number of participants for a small-scale study (Cohen et al 2018). The participants would be preservice elementary teachers who were studying at the university in which I was employed and would be in the final year of their studies. My aim was to explore their perceptions regarding attitude, confidence, and motivation to engage with their mathematics classes. In the second year of my study I planned to periodically interview and observe the now qualified teachers teaching mathematics. We would discuss and agree on criteria to measure the extent to which their practice was affected by their university-based and school-based mathematics professional development events. I anticipated that my study could have yielded interesting findings in terms of the transition from a student to a teacher who would be responsible for a class in a school. I

expected that the number of participants would reduce from 30 to ten as individuals might move away from the area, or they might not start teaching immediately. Another consideration was that the newly qualified teachers might choose not to continue with the study should they decide to focus purely on their teaching.

The actuality of the research plan

Upon my arrival in Canada the university's research ethics office was closed for three months due to lockdown restrictions. University closures stalled researchers' engagement with their proposed samples (Herman et al 2021; Radecki and Schonfeld 2020), yet the delay gave me time to consider my recruitment processes.

Assumptions were borne from the ease of the recruitment process during my doctoral work in England in which my role as a preservice teacher educator provided social capital. I was known and had access to 600 students and a number of schools. All of the teachers who were eligible to participate volunteered. In fact, two part-time teachers who had missed the introductory meeting asked to be included after hearing their colleagues talk about the study. I credit the success of this recruitment to the fact that I had made a connection with teachers within their school settings. I asked head teachers with whom I had a professional relationship for consent to interview teachers. I assumed that in my new Canadian context I would initiate my social capital by simply popping into a whole cohort lecture at the university in which I was employed, in order to introduce myself and explain my study.

However, lockdown restrictions meant that university-based teaching and learning was taking place online and, as experienced by Kobakhidze et al (2021), access to potential participants was limited. The idea of displaying posters in high volume foot-flow areas (Kim et al 2021) such as the doors of lecture halls and teaching rooms was moot. It was not possible to attend a whole cohort lecture or mathematics classes and the opportunity to establish myself as a known and recognized faculty member was limited. Despite living 30 minutes away from campus I experienced what Kim et al (2021, 1) refer to as "geographical isolation" as I could not engage with final year students.

One option that was available was advertising my study in the online student newsletter. Unfortunately, the timing of the ethics approval coincided with the final student newsletter of the year and yielded just one response. At this time I was participating in a Twitter-based innovation project, which provided a good opportunity to recruit; my research would appear on the university's Twitter feed, which suggested a semblance of social capital. However, the number of participants remained at one. In hindsight I recognize that my proposed participants were reaching the end of their degree programs having completed a difficult and demanding year. Participating in research was most likely the furthest thing on their minds.

With regard to the second year of the study, I had assumed (based on my experiences in England) that students would be offered jobs at their school practicum placement or through applications before they completed their final year. I would be able to contact the schools to arrange an initial visit. However, this assumption was wrong, I learnt that in Canada once students have qualified, they need to acquire 400 days of teaching, usually as a substitute teacher before they could gain a full-time, permanent teaching position. The continuance of my study was compromised by this knowledge. I found myself in the situation in which "thousands of researchers [were] scrambling to figure out what to do and how to preserve and protect their research" (Radecki and Schonfeld 2020 17).

The postdoctoral fellow research plan – created amidst the pandemic

I conducted what Kerr-Cumbo, Visanich, and Muscat-Inglott (2024, this volume) refer to as "reactive major modifications" in terms of my research methodology. These modifications affected my research aims, the participant sample, the recruitment process, and the research tool. There was a sense that swift action was needed as by the time I reviewed my research plan I had been in my postdoctoral fellowship post for eight months of a 12-month contract. I reflected on one of my doctoral research conclusions in which I recommended that teachers receive specific and bespoke professional development that meets their individual needs in terms of their insecure mathematics knowledge. (Eventually, I would draw on professional learning as a theoretical framework for this postdoctoral study.)

I recalled my experiences of teaching and observing preservice teachers and their reactions to certain topics, such as long division. I recalled (anecdotally) students telling me that they did not like/understand this concept and would therefore take steps to avoid teaching it. I reflected on the feedback I had given following observations of mathematics lessons in which the students required developmental targets. The literature refers to what teachers should know, however there is little discussion of the struggles that may occur due to unfamiliar concepts, misconceptions, or gaps in teachers' mathematics knowledge. These struggles may well appear in the moment of planning or teaching, which means that the professional development need is immediate. Hence the research question of my revised research was: What are elementary teachers' perceptions of the effectiveness of professional development events in meeting their needs for teaching mathematics?

The recruitment of participants and ethics applications

Similarly to Kim et al's (2021, 3) study I "pivoted to use Facebook" and I spent time making friends with past and present teaching colleagues. I also developed my Twitter network through the use of hash tagged key terms, which

Kobakhidze et al (2021) argue broadens the range of lesser-known professional groups and/or similar topics. I made connections with professional groups on both social media platforms. Once ethical approval was granted, I posted my recruitment poster to my home page. What I did not do was make requests to professional groups for my poster to appear on their social media pages, which equates to passive recruitment (Kim et al 2021). In actuality, I consider that advertising research on social media was a bold move to establish social capital within a community of thousands of elementary teachers.

I was persistent in my efforts to recruit and I completed another ethics application for snowball sampling that involved me emailing my recruitment poster to my teaching colleagues and friends in Canada and England. I asked this small group to pass the email and/or the poster to their teacher friends and colleagues as a means of recruiting participants without directly contacting them myself (Kim et al 2021; Leighton et al 2021). I estimated, based on my limited knowledge of my friends'and colleagues' networks, that there was the potential for 120 teachers to receive details of my research. This number far exceeded the optimum number of 30, which I had previously aimed for and it was exciting to think that I might create a large-scale study. Mobilizing my network of colleagues and friends was a positive enforcement of my social capital. However, I lacked a connection with what Kim et al (2021) refer to as community organization that could have been beneficial in terms of recruiting through a central, well-known office, e.g., NRICH (an online resource for mathematics). As a sole researcher there was no option to reach out to team members' professional networks, which might have increased the potential to reach a broader range of potential participants (Kobakhidze et al 2021).

I had not offered my recruitment poster to a population (e.g., a school district in Alberta, a local authority in London) in which all teachers had the potential to participate, therefore I had shown sample bias (Nulty 2008). Those participants who could engage would presumably do so because they knew me or were friends/colleagues with one of my friends/colleagues. My actions may have been perceived as coercive and participants may have engaged because of a sense of wanting to please the person who made the connection (Kim et al 2021). That said, ten months into my fellowship role I successfully recruited 13 participants. While I did not achieve my optimum number of participants, I was pleased that teachers were prepared to engage, bearing in mind they were experiencing their own pandemic-related difficulties. My actions had proved to be rigorous in terms of undertaking an exhaustive sequence of ethics applications, making revisions to my research design and developing an appreciation of the potential of social media.

Methodological considerations

The sensible option was to repeat the methodological approaches that I had developed during my doctoral work. I had used a qualitative methodology in order to elicit in-depth understanding of the teachers' experiences while giving

"voices to participants" (Cohen et al 2018, 288). I immersed myself into the participants' social settings (their schools), which enabled ideas to develop through conversation (Newby 2014). I had adopted an interpretivist epistemology to gain an "understanding of human behaviour" (sic), as recommended by Bryman (2016, 26). In order to explore the participants' experiences through conversation my interview questions were collated into topic areas, which afforded me the option of selecting/omitting a prepared question and/or modifying it according to the participants' responses within the online survey. This flexibility worked well as my sample consisted of a hierarchical range of teachers; head teachers, deputy head teachers, mathematics coordinators, and class teachers. I was well placed in terms of my social capital to complete purposive sampling, which requires a specific selection of participants (Cohen et al 2018) that was based upon teachers' current role and their length of time within the profession.

The teachers' perspectives were fundamental to my postdoctoral research study; what were their experiences in teaching mathematics and how effective were their professional development events? I was confident that my research would be robust and rigorous if I included as many familiar methodological considerations as possible. However, my study would go on to include an online survey as the research tool of pandemic-related necessity. Apart from being the recipient of many online surveys I had no experience of designing one for a rigorous research study. Having undertaken a swift deep dive into this research tool, I designed a survey. I chose Google Forms as the survey provider as it was free, secure, and intuitive to use.

Online surveys are cheap, efficient, and environmentally friendly as they negate the need for costly activities such as printing, making phone calls, and travel (Roberts and Allen 2015). Cohen et al (2018) suggest that simple completion strategies and regular recruitment postings potentially maximize the number of participants and the quality of data. Participants can complete and submit the survey at a convenient time and researchers can access data immediately regardless of time zones (Cohen et al 2018).

Nonetheless, response rates might not be substantial and the depth of participants' responses could be limited. Roberts and Allen (2015) warn of low response rates along with high rates of participant drop out and non-response to questions. In contrast to Kim et al's (2021) recommendation to lengthen the duration of the recruitment period I reduced the time between posting my poster and accepting responses. My rationale was dual purposed; (1) I needed data quickly in order to have time to conduct an analysis and produce a paper, and (2) it made sense to request the completion of the survey as soon as the participants, who were busy teachers, decided to participate. Upon reflection, I recognize that I projected my anxiety to collect data onto the recruitment process. A more generous schedule was applied when I arranged the interviews, which typically took place within three weeks of the completion of the online survey although, similarly to Kim et al's (2021) study, some participants were lost as they did not respond to my email.

During the pandemic, researchers were encouraged by university ethics boards to conduct interviews online in order to comply with social/physical distancing regulations (Oliffe et al 2021). The online platform of Zoom is beneficial as it reduces travel-related costs, enables worldwide communications, and can replicate face-to-face conversations (Archibald et al 2019; Gray et al 2020). Participants can use a range of devices - a PC, laptop, tablet, mobile phone – and conduct the interview in a location of their choice (Gray et al 2020). Being in a comfortable, convenient setting, such as at home or in the car, can afford participants a sense of security, which increases their candor (Gray et al 2020). The technology of Zoom is simple and user-friendly, with most issues relating to wi-fi, bandwidth, sound or, connections (Archibald et al 2019).

Reflections of my methodological considerations

I had hoped that ten teachers would complete the online survey, five of whom would agree to engage in a follow-up interview. My recruitment posters only reached a select group of respondents due to my selectivity in terms of who I considered suitable to promote my study. Hence, I applied sample bias as I did not offer all potential participants the opportunity to participate (Nulty 2008; Roberts and Allen 2015), i.e., every elementary teacher in Canada and/or England. I drew on my strong sense of social capital when I advised colleagues and friends that my recruitment poster would be appearing on Facebook and Twitter. I reached out by email to colleagues in Canada and England with whom I had worked and was still in touch. I am aware that my recruitment poster on Facebook was shared, which boosted my social capital as friends and colleagues were effectively endorsing my study, albeit in a selective manner in accordance with their Facebook friends and those with whom they decided to email. Other colleagues "liked" my poster, which also endorsed my study in terms of showing their recognition of me as a colleague. I am grateful for these connections, although I recognize that my recruitment might have reached a broader audience if I had enhanced my social capital by establishing professional connections, e.g., with teachers' associations and school districts, as recommended by Kim et al (2021), Leighton et al (2021), and Kobakhidze et al (2021). To some extent I agree with Kim et al (2021) that I engaged in passive recruitment by merely placing a poster on my Facebook and Twitter pages. Using platforms that were effectively new to me indicated my persistence in recruitment and my determination to keep pushing forward with my research. I was overwhelmed by my lack of social capital, apprehensive about the robustness of my study, and put off by the notification on some sites that they would not support research studies. While my Twitter network was broader, it included 18 people within the field of mathematics teaching and learning and included two useful connections (#Iteachmath and #mathcpdchat), I yielded only one retweet.

Throughout this time I met regularly with colleagues within my research group, which was made up of teaching professionals from around the world.

Some were actively engaged in research, others had retired and had recently been able to re-join the group due to its enforced online format. The group format of the Zoom meetings limited my capacity to show my potential. Casual conversations with one to two colleagues would have been a more comfortable way for me to open up about myself. That said, I explained my ongoing difficulties and the actions I was considering or had conducted and I felt a sense of empathy from the group. I appreciate the support that I gained from my research group, particularly in terms of boosting my social capital through sharing and circulating my recruitment poster. On reflection, I wonder how inclined I would have been to share a recruitment poster with teacher colleagues and friends, during the pandemic, in response to the request of a new colleague.

With regard to the online survey Graber et al (2011) refer to subscales that can examine the relationships between two or more areas within the study. Within my study there were two areas of potential relationships that I wanted to explore; teachers' qualifications and their confidence. Teachers were asked to select the teaching qualification that they had completed and to indicate if they were confident, confident to some extent, or not confident when teaching mathematics. Graber et al's (2011) research included over 500 participants and 164 survey questions, thus they were able to recognize relationships and differentiate the levels of correlation (low, moderate, and high). Asking teachers to consider their mathematics knowledge through the completion of an online survey may have presented a barrier, especially to those who perceived that they lacked confidence (indeed, the lack of responses from non-confident teachers supports this point). Engaging with teachers face-to-face would most likely have allowed me to establish credibility as an empathetic researcher who cared and was not judgmental about teachers' lack of confidence/knowledge. I had not included further questions to elicit detail in terms of relationships, which thwarted my attempts to correlate the areas of teachers' qualifications and confidence.

Online surveys should be straightforward and simplistic in design to encourage participants, e.g., selecting from a drop-down list of options, yes/no options, and rating criteria, according to Cohenet al (2018). Questions that elicit a written response can be included and it is possible that the participants' anonymity may lead to more honest responses (Cohen et al 2018). That said, I wanted to explore teachers' perceptions of the extent to which a professional development event was effective, according to their individual needs. My presumption was that teachers would reflect on three professional development events and prioritize them according to which event was effective, effective to some extent, or not effective. Accompanying guidance was included for each question, teachers were asked to consider the content of the event, their engagement, and how they changed their planning and teaching. A limitation of these questions was the number of considerations that teachers were expected to ruminate upon. In order for teachers to explain and describe their experiences they would have needed to write a substantial amount. A conversation would have been beneficial for teachers to unpack each event in a cumulative

and reflective manner. On reflection, I understand that the participants provided brief answers in order to complete the survey and move on.

I did not consider that a teacher might jot down a sentence or a few words in response to questions that required detailed responses. Below is a discussion of one of the online survey questions:

- Describe an event where you struggled with mathematics (This could relate to planning or in class input. Think about concepts and pedagogy.)

When I reflect on this question, I realize how difficult it could have been to answer. With the exception of approximately three participants (who I recognized as friends/colleagues) the teachers knew nothing about me. Asking teachers to consider their difficulties, not even in terms of teaching mathematics but generally their struggles, could have been perceived as a deeply personal question. From my perspective this question invited a description of a lesson that had gone wrong, a planning activity that involved research, and so on. In my mind there is no stigma to struggling in mathematics as struggles are simply indicators of an opportunity to develop. There is a vast difference, however, in eliciting responses from teachers, with whom I had no social capital, who may have been concerned about damaging their reputation. Had I asked the question within an interview I would have provided an example from my own experience. Creswell and Poth (2016) recommend this in order to address a power imbalance and to establish a sense of shared experiences. Teachers would have been able to decide how much information they provided. Naively, I assumed that this level of rapport and trust could occur within an online survey. My intention had been to invite teachers to start to think about their professional development, with a view to discussing their perceptions and experiences in detail with me during the interview.

I planned for my interviews to explore certain topics, such as confidence, struggles, and the effectiveness of professional development. Generic questions were asked of all participants and I also wrote specific questions based upon the teachers' survey responses. The semi-structured interview provides flexibility to the researcher in terms of when questions are asked and when a probing question might be appropriate (Cohen et al 2018). They gave me the opportunity to pursue pertinent points and modify my questions according to the teachers' responses. I compiled some generic questions that spoke to the research questions, for example:

- Tell me when you are confident teaching mathematics.
- What makes you confident?
- What do you do when you find yourself planning to teach a concept that you struggle with?

While interviews allow researchers to immerse themselves into participants' social settings, enabling ideas to develop (Newby 2014), there were limitations

brought on by the online-ness of the conversations. A relationship needed to develop through the long-distance lens of a Zoom call (Najma et al 2024, this volume). The participants and myself inadvertently interrupted and spoke over each other due to "lag times" that stilted the spontaneity within our conversations (Oliffe et al 2021). The transcripts suggest that a strong rapport existed between each teacher and myself. However, this required a significant effort to project my empathy and concern for the teachers' experiences while experiencing the paralyzing effects of instances when the audio was out of sync. This rapport was important in order for the teachers and myself to socially construct our understanding of their experiences.

Data analysis

Thematic analysis involves a researcher recognizing repeated topics within the participants' responses, collating these into overarching topics and naming them (Bryman 2016). My doctoral work involved a complex thematic analysis as the data related to three policy phases that spanned 16 years and my theoretical lenses involved policy enactment and social constructionism. A thematic analysis was appropriate to my postdoc study and I was able to draw on familiar processes. I knew that I would not use a computer-based application as my previous experience told me that I would create too many codes. That said, it took several attempts to create a useful data analysis.

Initially, I created a map to list concepts and make connections among them. The categories of concepts included the mathematics topic, type of professional development, strengths, struggles, level of confidence, and experience. I sought overarching topics that would become themes but was thwarted by the fact that the emergent themes were simply a redistribution of the survey questions. It soon became apparent that the survey data contained snippets of teachers' experiences that I also listed within the concept map. Questions with pre-determined answers to select from – e.g., time teaching, age of children taught - re useful for detail about the sample but added little to establishing relationships within the concepts. There were too many topics to justify a rigorous analysis, instead I created what amounted to annotated lists. My analysis of the five interview transcripts was stymied as the responses contained more detail and therefore could not be written onto the concept map.

I shifted my analytical focus from mathematics to professional development and re-examined the data, identifying instances where the teachers referred to ACME's (2016) principles of professional learning. I repeated the process that I undertook within my doctoral work and copied the responses from the survey and interview into a table using Microsoft Word. Seeing the data in tabular format enabled me to identify that teachers considered their professional learning as effective, or not, with no instances of events that were effective to some extent. They referred to personalized and sustained provision and collaboration, which resonate with ACME's (2016) recommendations. The next step involved analyzing the similarities and nuances within the teachers' responses.

The interview transcripts contained substantially more data as I travelled with the teachers and they described their experiences in depth. I read and re-read the transcripts in a different order from their accumulation and from different points in the text, as recommended by Newby (2014), which enabled me to maintain a fresh approach, rather than becoming very familiar with the early transcripts/pages, and fatigued later on. Fortunately, the interview questions supplemented the survey and therefore contained more detail as opposed to new findings. Therefore, it did not matter that survey responses were briefer than those provided in the interviews and each teacher was included at least once. The next step involved me merging responses into a row of the table that was determined by ACME's professional learning principles. I concluded that teachers' engagement in professional learning is effective when their needs are swiftly met in terms of their pragmatic considerations for an upcoming lesson. There were instances in which a personalized development plan, which ACME (2016) advocates, could have meant that teachers avoided the experiences of professional learning that was not effective. While teachers engaged in collaboration, they valued reaching out to school-based colleagues, rather than engaging with a broader group that included colleagues from other schools, as recommended by ACME (2016). My analysis now focused on the teachers' perceptions of the mathematics professional development they needed and the nuanced ways in which it was received.

Discussion and conclusion

My findings accurately addressed the research question. It is unlikely that teachers would have different responses between the survey and the interview in terms of their mathematics strengths and struggles or their professional development experiences. More likely, the findings would be repeated albeit with greater detail, obtained through interviews. A large amount of data were obtained through the interviews and I heeded Cohen et al's (2018) warning that researchers need to be selective with the data that are chosen for analysis. Each teacher was included within my analysis as I strove to avoid privileging the teachers who participated in an interview.

I consider that my research was rigorous and robust as a study that was conducted during the pandemic. Difficulties were due to my naivety as a new researcher and the limited opportunities to develop my practice while working remotely in a new country. The pandemic-induced shifts in my research design led to the use of an unfamiliar research tool, rather than my preferred and previously successful conversational interviews. There was a sense of panic, particularly in terms of recruitment. While I was not concerned with the idea of dropping out, which was a concern for some researchers (Kerr-Cumbo et al 2024, this volume) I rushed to complete ethics applications and the online survey. I wanted to be successful, which relied on social capital that I could not acquire.

The process of networking consisted of reaching out for help with recruitment through social media, which was personal development for me as a postdoctoral fellow (Chen et al 2015). Resilience and persistence are key qualities that I developed during my doctoral work and were instrumental to my postdoctoral experiences when I contacted colleagues and friends in Canada and England. Networking was beneficial in terms of productivity (Chen et al 2015) as it led to the successful recruitment of participants. I gained further personal development through the completion of several literature reviews, which started with the exploration of how and what preservice teachers learn and shifted to the mathematics knowledge and associated professional learning of qualified teachers. I consider that I successfully learnt how to administer an online survey and I reflected upon the strengths and limitations of this research tool. I learnt that my pragmatic and proactive responses overcame professional challenges, brought about by the pandemic, which led to the major modifications (Kerr-Cumbo et al 2024, this volume) to my research design that ultimately led to the completion of my study.

I suggest that there were four consequences of utilizing an online survey. First, I was unable to facilitate Burr's (2015) social construction in which teachers and myself would construct and reconstruct an understanding of their experiences through conversation. Second, my interpretations were limited to a focus on specific terms due to the brevity of the responses. Third, I was unable to interpret the responses related to teachers' strengths and struggles in teaching mathematics. Interesting comments, such as Rita's point that addition and subtraction are "a bit like a minefield" and Susan, who was confident "teaching all areas" warranted further explanation. Equally, listed points, e.g., long division and fractions involve many concepts that needed to be unpacked. The fourth consequence was my inability to draw on the theory related to teachers' mathematics knowledge. Any analysis would have been tenuous, which would have weakened the validity of my study.

The use of an online interview occurred in response to lockdown restrictions rather than design. That said, I had conversations with teachers from Canada and England, which could not have occurred in a face-to-face capacity without travelling. The teachers benefitted from conducting the interview in a convenient and comfortable location (Gray et al 2020) of their choice, which was their homes. We often encountered "lag times" (Oliffe et al 2021) and on one occasion audio echo occurred, which disrupted the flow of the interview. I assumed that teachers would be experienced Zoom users as they had been teaching online, which was indeed the case.

My research took place during what Radecki and Schonfeld (2020) refer to as new and uncertain times, which necessitated managing complex and difficult situations. Navigating the ethics process for school boards was moot for two reasons: (1) the original study was abandoned, and (2) it was unlikely that I would be granted access to schools that were working very hard to manage frequent closures and moves to and from online learning.

There was a sense of self-imposed pressure to complete my research, along with a sadness that so many of my initial ideas were not achieved. I forfeited opportunities too often and too easily as I felt burdensome upon schools and teachers. According to Suart et al (2021) 70.7% of graduate and postdoctoral researchers felt pressured to publish to be seen as successful during pandemic lockdowns. Fortunately, I did not experience this although there was a sense of running out of time to collect and analyze data (Suart et al 2021) in order to produce a robust academic paper. I also wanted to develop my research skills and contribute new knowledge to the field in which I originally engaged through my doctoral work.

The intention of this chapter was to reflect on the research methodology of a study undertaken during the COVID-19 pandemic. My reflections include the impacts of the pandemic and modifications to my research design. Considerations of my personal experiences were unavoidable within this autoethnographic piece and are entwined with my professional journey as an early career researcher. I am proud to have completed a research study, in a new country, during a pandemic and I appreciate the support I gained. If my journey illuminates pandemic-related impacts while simultaneously highlighting the outcomes of a novice researcher's resilience in modifying a study then my experience will truly have been successful.

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TROUBLED WATERS, FISHERMAN'S GAIN

A critical reflection on carrying out multi-sited research in times of COVID-19

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In retrospect, the COVID-19 pandemic was truly an unprecedented crisis; it not only disrupted every sphere of human activity on the planet, but for some its aftermath is still being felt (Papademetriou 2020). Interestingly, despite the extreme measures taken by national and local governments and international organizations to stop its spread and build a response, societies from below re/configured their daily lives into what we called "the new normal". These new strategies either transcended – by coping or escaping – the multitude of obstacles that were put in place in order to control human mobility at the macro, meso, and micro levels; or surrendered to the new mechanisms of control – by accepting at face value official mandates. Academic research did not escape these dark times, nor did such disruptions halt scientific efforts from emerging in all disciplines.

Even though academic research was heavily impacted by the pandemic, individual and some institutional efforts emerged creating the conditions to conduct field research during lockdowns and periods of confinement. On this basis, the pandemic provided a unique opportunity to assess and reformulate its more traditional practices and techniques, or otherwise due to the heavy restrictions many if not most research agendas would have had to come to a complete stop during this period. Not surprisingly, the results that could be observed when comparing traditional against less conventional field research practices serve as food for thought with respect to the notions that still remain stubbornly skeptical about incorporating new communication technologies in data collection processes.

The focus of this chapter is twofold: first, to provide the reader with enough background to understand the research project that was used as a basis for the second and main objective which is to develop a critical reflection of what it was like to conduct multi-sited research during the pandemic using both in-person and remote data collection techniques. In 2019, a three-year process of

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transatlantic field research concluded baring important findings in the field of transnational return migration; two of these key findings are related to processes of no-return and the emerging field of return intention. It is in this context that a new – and independent – research project was formulated almost in synchrony with the global health crisis provoked by the COVID-19 virus. Thus, from the outset the research design included techniques for in-person and for remote data collection, however, the hurdles and negotiations that also informed the stages of data collection and analysis were all unforeseen. Using field notes of the exploratory research carried out in 2021 and 2022 in Spain and Dominican Republic, a critical reflection is carried out about the opportunities and limitations associated with conducting qualitative research during the pandemic using in-person and remote data collection techniques.

Dominican migration to Spain: Genesis and evolution

One of the main objectives in studying Dominican return migration relates to the interest of understanding more deeply how Dominican migrants come to the decision of moving back to the island and what markers of identity – national and otherwise – are present in these decisions. In this line, questions such as where and what they are returning to and what they are leaving behind constitute part of the main aim to unpack those inquiries both at a material and symbolic levels (Van Houte 2014). Some of the previous results that informed this present reflection suggest that Dominican migrants are pressured by several constraints when assessing whether to return, move elsewhere, or stay; however, once the decision to return is made, a different set of questions arise. Some of those "new" questions try to investigate migrants' national allegiances and sense of belonging.

Over the past few decades, Dominican Republic has consistently remained as a country of emigration, immigration, and transit (Abaunza 2015). Despite the country's levels of net economic growth, which makes it the leading nation in Latin America and the Caribbean, the levels of inequality continue to be some of the highest in the region (OECD/CIES-UNIBE 2017). Ceara-Hatton (2017) has called this situation the Dominican Paradox, referring to the fact that the unprecedented economic growth has contributed very little to changing many of the socioeconomic determinants that pushed people out of the country since the 70s up until now. The same can be said about Haiti, its neighboring nation, which in part also explains why Dominican Republic presents strong pull factors for Haitian nationals (Ferguson 2003). Becoming a transit country, though, has little to do with push and pull mechanisms inherent to the island, but rather "new" routes that smugglers have developed for bringing people into the United States (US) territory, either into Puerto Rico or the continental US. Most of the points that attract other nationals to these places serve to explain why Dominicans also choose the US and Puerto Rico as primary destinations; followed by Spain and Italy, which require other explanations such as historical and sociolinguist reasons (Abaunza 2017).

It is now known that the first cases of Dominican migration to Spain are intimately related with the formation of transnational religious networks between the two nations (Abaunza 2020; Martínez Buján 2007). A religious order comprised of nuns in the regions of Vincente Noble and Tamayo in Dominican Republic seems to be the epicenter of the first flows of women migrating to Spain to provide services as domestic workers. In the 1980s, as the Spanish society moved powerfully towards its modernization, women entered the formal labor force, provoking the need to hire foreign women as domestic workers. The adopted labor replacement mechanisms favored Latin American women – over other migrant populations, such as the Moroccan collective – given a series of shared characteristics such as language – Spanish – and socio-cultural background – conventional Roman Catholic traditions (Pedone and Gil Araújo 2008), and in some cases racism. The conditions fueled by the unprecedented economic growth experienced in Spain at the end of the twentieth and beginning of the twenty-first centuries acted as pull factors for thousands of young women who migrated to the Iberian Peninsula mostly from Bolivia, Dominican Republic, and Ecuador (Aja 2012).

It was just a matter of time before other Latin American populations would follow, particularly men whose wives had already migrated and established themselves in Spain, and other relatives with a first degree of consanguinity. Thus, through many different family reunification processes, thousands of Latin American families established themselves in Spain partly favored by a principle of cultural preference (Izquierdo and Cornelius 2012). Some Spanish scholars argue that this chain migration is a testimony to the failed policies of the government in trying to manage the different waves of incoming migrants via regularization plans (Aja 2012; Cachón Rodríguez 2006). This, of course, resulted in the incorporation of hundreds of thousands of irregular migrants – and regular migrants coming from other European member states – into the Spanish social fabric, amounting to more than 5 million in a little over a decade (Tejeda et al 2019).

Dominicans in Spain: Mobility and return during the pandemic

Migration is a multifaceted, multidimensional, multiscalar, multifactorial, and multidirectional phenomenon. In this sense, a migrant's decision to return is never an easy one, and its execution might be in fact even harder. In the case of the Dominican population in Spain, planned and unplanned returns have been recorded where individuals or family units move back to the island once their objectives were reached or through deportation processes. Typically, Dominicans move back willingly once they have realized certain dreams such as buying a house, opening a business, or amassing enough cash to retire comfortably; on the other hand, in the case of those who have returned unwillingly, it is usually because of deportation for being irregular in the country or, in fewer cases, for committing crimes (Abaunza 2020).

In part, the so-called "golden decade" (1995–2007) or "Spanish miracle", namely the economic bonanza experienced during the second half of the 1990s and the first half of the 2000s, occurred due to the sizeable investment in the construction sector, which in part explains why the financial crisis of 2008 hit Spain particularly hard. Since the 2008 global crisis was directly linked to subprime mortgages, the collapse of the banking system went hand in hand with an abrupt halt of construction works, having catastrophic consequences for migrant communities as more than half of the labor force of this sector was comprised of foreigners (Aja 2012). To make matters worse, when the financial crisis hit Spain, it immediately translated into job destruction and a housing crisis, causing thousands of families to lose their homes to the banking sector (Barañano 2016; Sørensen 2015). This being the case, hundreds of Dominican households had no other alternative than to remigrate or to return.

The segmented labor market in Spain operates in a way that produces little to no competition between the autochthonous population and migrant communities, the former usually accessing high-skilled jobs and the latter low-skilled ones (Cachón Rodríguez 2006). Regrettably, this also means that migrant workers often resort to sectors that tend to be the most vulnerable during times of crisis, which proved to be true during the pandemic as most migrants were employed in the construction sector, hotel industry, agriculture, and domestic service. These sectors were all hit hard during the pandemic for different reasons: some because of lockdowns, confinements, or business closures, while others because of unemployment or economic insecurity. This prompted Dominican families to reformulate short-term strategies to cope with or escape from the health and economic crises.

The pandemic impacted migrants and migrant communities in different ways. Some Dominicans, for instance, had full access to the health care system, social services, and unemployment benefits, while others did not. As with most nations around the world, many allowances and services are subject to a person's migratory status in the country. In this sense, even though the Spanish authorities lifted any official requirements that would impede anyone from having free access to the health care system during the pandemic, people's experiences on the ground varied depending on their migratory credentials and levels of integration into the Spanish society. Be that as it may, the pandemic had such a disruptive impact that it effectively forced most migrant families to rethink their ongoing migration projects vis-à-vis their new strategies of re/production.

Conducting multi-sited research during the pandemic

To better understand why certain families and/or individuals decided to return, while others remigrated or simply stayed where they were, a multi-sited methodology was followed. The goal was to study how transnational migrants re/negotiate different identity and logistical concerns as they formulate certain

decisions or execute certain migration strategies embedded in a complex cartography that often involves simultaneous and contradictory moves across national and international borders (Parrenas 2020). In the context of transnational migrations, returning is not an easy and straightforward decision, but rather a complex and difficult process (Hosnedlová 2014); one which is full of uncertainty, ambivalence, and, sometimes, regrets and anguish (Carling and Collins 2018). Having lives that are extremely connected to various localities at once entails levels of hybridity where certain constructs that might have been somewhat stable prior to the migration experience become fluid and contested (Marcus 2011; Scholten 2018). Some of these constructs include people's adherence to a national identity which affects their sense of belonging and might ultimately be the decisive factor as to how well integrated they are in the different spaces they live in synchronically or asynchronically (Çaglar and Glick Schiller 2018).

Therefore, the notion of "moving" along with the Dominican population in Spain was central to this particular research project to see if there were any discrepancies in their lived experiences or possible evolutions with respect to how they interpreted their own alliances and sense of belonging vis-à-vis their migratory status and migration strategies. Interestingly, the literature has consistently insisted on the notion that one never returns to the same place – as places change and people change – which is why several authors have been questioning the category of "returning home" (Dumont and Spielvogel 2008; Espinosa 1998; Harpviken 2014) somehow reviving what was once a very productive subfield in exile studies – decades ago, theorized as "homecoming" (King et al 1995).

A multi-sited approach to finding out how Dominicans felt once they were "back home" had to be implemented via Skype, WhatsApp, and Zoom interviews. The unforeseen complexities surpassed the foreseen ones, and the latter were many to begin with. The first great challenge was convincing people to participate in an interview during strict lockdowns and confinement measures. According to some accounts, some potential participants were hesitant because they felt uncomfortable sharing their precarious living conditions with an outsider. Indeed, some participants might have felt ashamed for having their modest homes as a background for the interview, and this might have been particularly true for those informants who, as many returned migrants do, place high importance on how others view them with regards their material accomplishments. Other factors such as lack of privacy might have also played a role in this hesitancy.

A multi-sited methodology is used in this project not with the intent to conduct a multi-sited ethnography, as Marcus (1995, 1998) originally proposed for the field of cultural anthropology, but rather to take one of the aspects of this methodology and translate it to the sociological study of migrations. This aspect is the idea of "following the tracks" of those involved in the phenomenon of study. While this is not a new idea, and from the beginning of the

systematic study of migration researchers have implemented this approach ad hoc, with Marcus, the idea of moving to – and sometimes moving with – the migrant population as a constitutive part of the research design results in a new and exciting way of conducting research with mobile populations.

The actual implementation of a multi-sited methodology for this research project developed almost "naturally" as initial informants referred to other people who were going through similar circumstances but in different contexts. Even though this resembles the snowball sampling strategy, it is not the same as the intention here is not to find new informants but to actually understand how the phenomenon is lived in different contexts and conditions. In other words, by "branching out" from the initial "epicenter" of where the researcher started conducting their field research, different pieces of the "larger puzzle" began falling in place; thus, allowing for a more comprehensive understanding of the phenomenon at hand. More specifically, within the return migration field, some migrants are confronted with different considerations before finally returning home or otherwise deciding to cancel their return plans altogether, and getting to know what those considerations are has proven to be vital in constructing a deeper understanding, not only of return migration but also of the return intention.

In following the tracks of Dominican return migration and return intention from Spain, I started my field research in Madrid, but then new information brought us to Valencia and Barcelona. This triangulation is not random. Even though many experts recognize the 2008 global financial crisis as over, in fact, there are other experts that continue to see how the consequences of that financial meltdown are still unravelling (Blanco et al 2021). In Spain, for instance, that global crisis did not peak until 2013, which not only extended all the negative consequences through time, but in fact prevented certain sectors from fully recovering (OECD 2021). This is crucial for understanding how many families experienced an alarming crunch in their livelihoods, which literally forced them to generate other strategies, including family separations, as a means for some to venture into internal migration processes, leaving cities with high unemployment rates, such as Madrid, for other places with better chances of finding jobs, such as Valencia and Catalonia.

During the pandemic, Valencia attracted a labor force to work in the agriculture sector, while Barcelona attracted people to work in services such as restaurant businesses and delivery services. Dominicans who were employed in Madrid in the construction sector – usually comprised of men – and domestic service – usually comprised of women – and lost their jobs, moved to other city centers and towns that would enable them to earn a living during such uncertain times. This move, of course, was needed but was not exempt from great emotional costs. As Spain is one of the hardest hit countries in the world with respect to the number of COVID-19 deaths per capita, people who could not observe the strict confinement measures imposed by the Spanish authorities felt scared, if not completely overwhelmed, by the possibility of getting sick and dying from the virus (Oliver 2021). Needless to say, many families did not have any other alternative but to accept these new jobs regardless of the health concerns associated with them.

Reflections on conducting qualitative research during the pandemic

Many researchers have discussed the need to reassess the role of information technologies in the ways in which we conduct qualitative research in today's world (Amelina et al 2013). More traditional views have obviously opposed the introduction of new technologies in the processes of data collection, more so than in data analysis (Sandberg et al 2022b); while others have actively insisted on the necessity to modernize our research practices in a more comprehensive way (Elo et al 2014). This discussion is both political as it is epistemological and methodological. It has always been the collective that legitimizes certain practices and devalues certain others (Sandberg et al 2022a). In this light, this section will critically analyze the opportunities as well as the limitations associated with the use of communication technologies in conducting qualitative research during the pandemic, including the way in which transcending spatial and temporal scales led to a reconfiguration of the roles between the social scientist and the informant(s), and the ways in which this reconfiguration affected the quality of the data collected.

The space that is created between a social scientist and an informant is often comprised of an expert and a person who is willing to share their experience and knowledge about their own lives; this scenario creates two distinct roles: the role of the scientist and the role of the informant (Becker 1998). When the two meet, a space is created, and it plays an important function in the initial configuration of the roles that will be at play in the exchanges between the scientist and the informant(s). These roles undoubtedly create a set of expectations that will have an impact on the quality of information that is shared by the informant (Gordo López and Serrano 2008). Ultimately, every process of data collection is situational in nature and as such demands, both implicitly and explicitly, a certain pattern where the information flow does not happen authentically, but rather through the heavy scrutiny of those expectations (Ynoub 2015).

In-person processes of data collection may also be biased as a result of the material and symbolic elements and conditions present in the space where it takes place. These elements and conditions do not only inform the way in which rapport is established but also the levels of agency that the informants may acquire with respect to telling – and interpreting – their own reality (Råheim et al 2016). These factors can be, of course, as liberating as they can be restrictive; difference that may effectively vary the way in which different informants respond to the same instrument – depending on the circumstances. In this regard, it is important to note that the epistemic position of research with respect to the quality of in-person data collection practices must be problematized, if not revised altogether. In the following, I will discuss how the introduction of new technologies for the remote study of return migration of Dominican nationals from Spain for the years 2021 and 2022 conversed with more traditional in-person practices; both of which rendered interesting results and will be presented and analyzed in the next section.

Discussion

In-person interviews

Traditionally, the scientific community has privileged in-person data collection techniques as opposed to remote ones. In fact, many qualitative researchers have categorized only in-person practices as good research, disqualifying other kinds of techniques. During the pandemic, this notion proved to be problematic to say the least. One of the main claims that often supported the idea of equating person-to-person with "good research" was the quality of rapport that one could build from being in physical proximity with one another. However, during the pandemic, strict measures had to be taken in order to conduct any type of in-person field research, which effectively transformed the quality of the interaction that took place between the researcher and the informant(s).

As there were several health requirements that had to be observed when conducting interviews during the pandemic, developing rapport was particularly difficult during the exchange. Therefore, having a close physical proximity which was always considered a strength had become a weakness. Thus, the relationship between the researcher and the informant(s) remained distant which evidently had an impact on the willingness participants had to share details about their lives and experiences. Moreover, a great deal of physical expression was lost – this was particularly striking with the Dominican population, as they tend to express a lot through their bodies. Indeed, Dominicans are usually very expressive, thus their physicality also tells a story, and most of this wealth of information was unfortunately lost during in-person exchanges throughout the pandemic.

The lack of physical and emotional expression that was observed in the Dominican community in Spain might also be related to processes of psycho-emotional fatigue resulting from having to deal with constant stress and anxiety. The general population in Spain was subjected to extreme measures of physical distancing and long enclosures which may have contributed to the interiorization and/or normalization of high levels of distress and distrust. If this were to be the case, this would explain why most informants were visibly reserved, if not closed, during the interviews. In other words, it would be naïve to think that the economic distress experienced by many may be the only cause explaining the unusual emotional distance observed in the Dominican community; other factors, such as the extreme measures of confinement imposed by the Spanish government, fear, and distrust, may also help explain this atypical psycho-emotional fatigue.

Additionally, one more factor may have influenced some Dominican informants in Spain in a negative way. During the beginning of the interviews three respondents were really concerned with the fact that I, as the researcher, had come from abroad, and their anxiety in trying to gather what kind of vaccination and booster shots I had received made it very clear that at least some

percentage of the population had high levels of fear of contagion. Once the pattern was observed, two questions were added to the semi-structured interviews about this fear and how becoming – hypothetically – infected would play out in their case. This unexpected exploration resulted in understanding how frightful this pandemic was for most informants, as the possibility of dying because of the virus was not an abstract idea in their minds, but rather a very concrete possibility. Many reported knowing someone who had died during the pandemic due to the virus. In this regard, as a potential source of contagion, I inadvertently became a cause of anxiety and distress; a situation which would have been avoided had we conducted these interviews remotely. All in all, it was obvious that several intertwined factors were at play which had a detrimental impact on the levels of rapport achieved during the process of in-person field research in Spain.

Remote interviews

Even though traditional data collection practices are giving way to innovative means of conducting field research, there is still some hesitancy about using remote data collection techniques for qualitative research. The COVID-19 pandemic, however, did not favor in-person practices which is why many researchers had to resort to remote ones, regardless of the epistemological assumptions they had with respect to these methodologies. Despite the initial apprehension many researchers may have had about remote data collection techniques, the truth of the matter is that, at least in my experience, the results were remarkably positive and worth exploring in more depth. Interestingly, the supposed lack of proximity that remote means are bound to produce did not affect the development of rapport; in fact, at least during the pandemic, the lack of physical proximity proved to be more conducive to creating a sense of closeness in a shared virtual space than in in-person interviews.

One of the most unexpected turns in conducting remote interviews was to see how the traditional roles of the researcher and the informant(s) became diffuse. The vertical relationship that is quickly built between the researcher and the participant(s) usually creates the conditions for the establishment of two very distinct roles, one of an expert who has the tools to pursue scientific inquiries and one of an informant who is present to render a story or interpretation of their account. In part, this binary relationship, which often empowers some and disempowers others, responds to the physical space of the interview process where the researcher poses as the one who asks questions, thus forcing the participant to adopt the role of a person who answers those questions; hence, one leads and the other follows. However, when that physicality is not present, the space seems to turn more democratic, rendering startling results.

During the pandemic, interviews that were conducted via WhatsApp, Zoom, or Skype gave the informant(s) the ability to control most – if not all – of the logistical and material conditions involved during the process. For instance, the

person could choose the time (morning, afternoon, or evening; workday or weekend); the place (at a public or private location; at work or at home, in the office, living room or kitchen); which device to use (cellphone, tablet, computer); where to place it (next to, in front of, above, below her/him; close, far); and who to include in the frame whether on purpose or by chance. As these central decisions fell on the researched, the person being interviewed apparently developed a sense of ownership of the process, resulting in the creation of a more horizontal relationship between the researcher and the informant.

The space of the in-person interview is usually controlled by the researcher. They reaffirm their position as an expert, thus generating binary roles which would distinguish researcher and researched as two opposite entities. Contrarily, it seems that in remote interviews one can observe at least three discrete spaces: the space of the researcher, the space of the informant, and the virtual space where the two meet. The creation of this third space seems to be less overbearing in nature, as it is outside the "tyranny" of the physicality of science. This third space is rather horizontal as it reverts the logic of power; after all, it is the researcher who needs the informant, not the other way around. Moreover, the notion that the informant can always disconnect – physically and/or symbolically – and end the conversation seems to be more present during remote field research experiences than during in-person ones. In this sense, remote means of conducting interviews may render great possibilities to establish a more equitable rapport between the parties.

In recent years, as the general public increasingly incorporates the use of communication technologies into their daily lives, it is becoming more common for social scientists to expect a positive reaction when they ask possible informants to participate in field research that features remote data collection techniques. In fact, the democratization of technological gadgets made it possible for people to have extensive experience in using different devices and applications as they use them on a daily basis to keep in touch with their relatives and friends despite the distance in time and space between one another. Remarkably, this familiarity has proven to work for the benefit of all involved: for the researcher, it allows for the connection to informants despite their location, and for participants it allows them to become more empowered by their own histories and the way in which they explore their own experiences.

One of the added benefits of having a more horizontal relationship between the researcher and the informant is the possibility of creating a context for a freer exchange of ideas. Sometimes, in more traditional contexts informants do not convey the truth about their own accounts but rather they share what they think the researcher wants to hear. Evidently, this conscious or unconscious mechanism is truly detrimental for the exploration and analysis of any given phenomenon. Therefore, having a freer exchange of ideas can only result in a truer account where people feel less coerced into sharing information that they might not be willing or able to share, but they end up sharing at their own emotional cost. In the final analysis, having agency – as an informant or otherwise – can only render positive results.

The harsh economic conditions and lockdown measures that both developed and developing countries had to face during the peak of the pandemic probably resulted in the fact that most remote informants had to conduct their interviews from their own homes. This condition alone, which sometimes is simply impossible to achieve during in-person interviews, rendered an incredible amount of – unintended – information that arguably makes it one of the most important contributions to the study of migrations that I have come across over the last few years. Being able to see the context in which informants are embedded and the personal dynamics they developed with their family members and friends proved to be as telling about their migration experiences as their own words and reflections. The old saying that "a picture is worth a thousand words" really comes to life in this example. Furthermore, having access to each informant's home enabled me to confront, problematize, and double check certain fragments or parts of their accounts that otherwise would have to be accepted at face value.

Conclusions

In conclusion, the unusual macro structural changes that were adopted by practically every government in the world as a response to the health crisis provoked by the COVID-19 pandemic gave scientists a rather unique opportunity to reassess that which we have long assumed as the optimal way(s) of doing things. However, when it comes to science, altering the status quo is one of the hardest things to do, in part, because current scientific frameworks have the tendency to become dogmatic over time – just as many self-validating narratives do. In this sense, more often than not, scientists tend not to bother with addressing their own epistemological and methodological assumptions with which they operate; and asking them to do so usually equates to asking them to leave their comfort zones, which not too many are willing to do. Consequently, over the last few decades, more attention has been granted to ethical concerns regarding knowledge appropriation and processes of techno-scientific application of scientific findings than concerns about our own knowledge producing practices.

I hope that the humble findings of this independent research project may contribute, in some way, to the problematization of the well-established corpus of knowledge regarding qualitative research in terms of what the scientific community has come to accept as "good research" versus other forms of, perhaps, less desired practices. In this light, by comparing what it was like to conduct in-person research to remote data collection practices, several results came to be remarkably telling. First and perhaps the most meaningful finding revealed that the long-standing assumption that using remote data collection practices renders shallower accounts proved to be false. Second, when using remote data collection practices, the traditional roles established through the power relations present during the interaction between the researcher and the informant(s) are blurred, resulting in a more horizontal exchange. Finally, the spatial and temporal scales present in every research endeavor are transcended

with the use of remote data collection practices offering new possibilities to break away from the demands of the local – here and now – scale.

I also argue that remote field research does not produce shallower accounts with respect to in-person practices; in fact, at least during the pandemic, the opposite is arguably true. Through this process of reflection, it became obvious that the physicality that the researcher exercises during an in-person session – especially or perhaps specifically – during the COVID-19 health crisis was not only intimidating but viewed as a potential source of contagion, which had a great impact on the informant, producing a more reserved, and sometimes closed, interlocutor. Thus, the lack of physical proximity acted as an enabling force which ultimately created the context for two simultaneous processes to take place: on the one hand, informants were more relaxed and cooperative, and on the other hand informants became visibly empowered in the research space – a third space that brings together the "here and there" into a hybrid space/time – which impacted the way in which participants were claiming ownership of their own histories and resulted in more intimate and in-depth accounts.

Among others, the notion of building rapport between the researcher and the informant has a very practical reason, namely the creation of trust so that any given person could tell a complete stranger a fragment of their life's story (Gabor 2017). In this line, participants claiming ownership of their own accounts is undoubtedly the epidemy of rapport building; a point that seems to be characterized by a greater sense of empowerment by the informants, allowing for a more horizontal, honest, and fluid exchange between the parties. This conversion in the relations of power gives way to a different exchange where one is not necessarily subordinated to the other, thus resulting in a more democratic conversation where neither party feels subject to a traditional role or relation of power. However, the fact that conducting remote interviews during the pandemic allowed for a more fluid and horizontal exchange between the researcher and the informant(s) does not mean that this finding has to be taken at face value: more research must be conducted to validate this experience and see if it still holds true in a post-pandemic context.

Finally, becoming more aware of the spatial and temporal scales involved in social research may lead to a reconfiguration of the roles between the social scientist and the informants, possibly having a direct impact on the ways in which data is collected and analyzed; ultimately provoking an evolution of the epistemological assumptions and methodological decisions about the scope of what social scientists have consistently accepted as "good" research. In the end, if we do not revisit from time to time those assumptions, we too become part of a tyrannical framework that discounts novelty in favor of that which we already know works, perhaps wasting resources and missing important opportunities in the process. Conversely, daring to implement new possibilities is very promising and may lead us to new and exciting ways of conducting research in an ever more connected world. In the end, the social, economic, and political crises that were generated during the pandemic may have given us a precious opportunity to reassess what we think and what we do in this global village; after all, in troubled waters, fisherman's gain.

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