

Research Adaptivity in Times of Disruption: Zig-Zagging Your Way through the Field During the COVID-19 Pandemic

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ABSTRACT

This study reflects on the field research interruptions that occurred around the world with the onset of the COVID-19 pandemic. Based on my experience of in-person and remote fieldwork with vulnerable populations and sensitive research topics during this time, I introduce a “zig-zagging approach” that can be used as a research adaptivity strategy in times of disruption. I argue that “zig-zagging your way through the field” is a legitimate strategy as long as researchers acknowledge that changing from in-person to remote fieldwork (and vice versa) will alter various aspects of their relationship with the field including; (1) perception of positionality and authenticity; (2) processes of trust building and security challenges; and (3) experience of ethnographic immersion and observation. I offer mitigation strategies to reduce the impact of change and also discuss aspects that cannot be mitigated when working with vulnerable populations or sensitive research topics. I conclude on why going back—and forth (i.e., zig-zagging)—should become a practical solution when all else fails.

Qualitative research often requires an in-person fieldwork component, such as visiting an archive, a village, a community, a neighborhood, or—in fact—any geographical location that one must travel to in order to collect data that otherwise would not be accessible. Before a researcher departs their institution for a designated field site, many hours are spent on obtaining research ethics approval and calculating budgets—preparation processes that can be nerve-racking and time consuming. Once in the field, however, excitement prevails and the research can begin. However, what happens when things suddenly do not go as planned? When your field site becomes inaccessible? This frightening scenario that impacted thousands of researchers occurred with the onset of the COVID-19 pandemic,

when I—like many others around the globe—was withdrawn from my research field site. In March 2020, my seemingly perfect research trip to Europe ended with a telephone call from my university urging me to come back “home” to Canada. My fieldwork project was put on hold, and what followed were months of isolation, worry, and attempts to return to the field. Over time, many universities understood the need for a response and extended funding to graduate students to mitigate the impact of the pandemic.¹ At the same time, however, students who faced research interruptions were instructed to “pivot” and adjust their research in ways that would make possible empirical analysis without using in-person fieldwork methods. In many cases, this meant a forced shift from qualitative to quantitative methods. Whereas some projects were ready for a “quantitative pivot,” this was not the case for my mine. It leveraged a comparative research design to understand Turkey’s diaspora engagement across European immigrant-receiving countries for several reasons. First,

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my research question required the study of causal processes to understand variation in outcomes. Second, it focused on the political behavior of vulnerable and difficult-to-reach populations, including immigrants, refugees, and those in exile who are subjected to transnational practices and policies employed by an authoritarian state. Third, I already had gathered substantive in-person fieldwork data, including in-depth interviews and ethnographic observations in Turkey's diasporas in Germany. However, my comparative study required more fieldwork, and using asymmetric or different types of data would not have been methodologically rigorous. Overall, it simply did not seem feasible to discard years of qualitative methods training and experience. Puzzled but determined, I decided to take my project online and try remote fieldwork.

This study introduces what I retroactively label a “zig-zagging approach” to qualitative fieldwork, defined as a process of spontaneous adjustments made to a given fieldwork strategy when field sites become inaccessible or unavailable.

Since the beginning of the COVID-19 pandemic, scholars from a variety of backgrounds have reflected on how to adjust to the challenges posed by it (Rahman et al. 2021; Tremblay et al. 2021) and introduced new approaches to digital qualitative fieldwork (Hall, Gaved, and Sargent 2021; Howlett 2022; Kaufmann, Peil, and Bork-Hüffer 2021). This article contributes to these debates by sharing my own insights on navigating such adjustments when working with vulnerable and difficult-to-reach populations on a sensitive research topic. I reflect on the effects that transitioning to remote fieldwork has had on research procedures and how the implementation of various adjustment strategies worked at times but failed in other instances—which ultimately motivated my return to in-person fieldwork when the field was again accessible. This study introduces what I retroactively label a “zig-zagging approach” to qualitative fieldwork, defined as a process of spon-

Whereas email or telephone recruitment had proven to be an efficient strategy for the recruitment of elite-level research participants for my study, it had been less successful in the recruitment of vulnerable populations. Therefore, I always relied on in-person interactions with potential participants during protests, rallies, and other events as a key recruitment strategy.

taneous adjustments made to a given fieldwork strategy when field sites suddenly become inaccessible or unavailable.² I make the case that “zig-zagging your way through the field” is a legitimate strategy as long as researchers acknowledge that changing from in-person to remote fieldwork (and vice versa) will alter significantly various aspects of their relationship with the field. This article discusses key changes triggered in various areas, including (1) perception of positionality and authenticity; (2) processes of trust building and security building; and (3) experience of ethnographic immersion and observation when shifting from in-person to remote fieldwork. For each issue area, I offer mitigation strategies to reduce the impact of change and also

discuss issues that cannot be mitigated when working with vulnerable populations or sensitive research topics. I conclude on why going back—and forth (i.e., zig-zagging)—should become a practical solution when all else fails.

NAVIGATING RECRUITMENT: POSITIONALITY AND AUTHENTICITY AMID A LOSS OF PHYSICALITY

Recruiting research participants is fraught with challenges that are not unique to in-person fieldwork. The standard procedure of reaching out often occurs behind a curtain of emails and telephone calls that limit the disclosure of certain identifiers (e.g., positionality and authenticity) to potential research participants.³ Whereas email and telephone calls had proven to be an efficient strategy for the recruitment of elite-level research participants for

my study, it had been less successful for vulnerable populations. Therefore, I always relied on in-person interactions with potential research participants during protests, rallies, and other events as a key recruitment strategy. Nevertheless, I was surprised when I went fully remote during the pandemic how my recruitment rate would be altered. As the months passed with little success, I identified the inevitable loss of physicality as the major cause that disrupted my efforts to recruit vulnerable populations during the pandemic.

Without the immediate disclosure of certain identifiers that signaled my positionality and authenticity as a doctoral researcher, which was beneficial during in-person recruitment, my recruitment efforts were in vain. I realized that, in the past, even the act of calling or reaching out to potential participants from the field site made a difference. Now, reaching out from

abroad from a foreign telephone number affected my success to contact interlocutors in the first place. Furthermore, I observed that the inability of my interlocutors to situate me physically in the field was further affected by the lack of certain physical identifiers (e.g., my face and my voice), which impacted my ability to recruit participants from afar. Reaching out to research participants from abroad proved particularly problematic when I was trying to engage vulnerable populations. In the field, I benefited from an immediate physical presence, making me real and authentic. However, reaching out from afar without even the prospect of any future presence in the field and asking for an online interview deprived me of an authentic positionality in the field. Realizing

that my positionality and authenticity as a member of Turkey's diaspora—and my identity in general—had accomplished much of the “work” in reaching out to participants in the past (often without me even noticing) was a helpful insight in developing mitigation strategies.

I therefore decided to digitally reconstruct my identity as a researcher. The first step was to increase my online presence. To communicate academic credentials to potential interlocutors, I launched a scholarly website summarizing what I do and who I am. Next, I established my social media presence for outreach purposes by displaying my identity only as a researcher and relevant attributes that would signal a digital presence to interlocutors. In reaching out to members of the diaspora who engage in activism against authoritarian regimes from abroad, it was particularly crucial to demonstrate that I was, in fact, authentic and real. Finally, to increase my credibility, I made sure to publicly display anything I had written on the topic, across online platforms. In combination, these three strategies proved to be a helpful intervention to impart to potential interlocutors important clues about my positionality and authenticity as a researcher.

Although these strategies did not compensate for everything that was lost when going remote, it allowed me to partially regain the authenticity and positionality that is needed for recruiting difficult-to-reach populations. On my return to the field when international travel was permitted again, I noticed that the strategy of ramping up my online identity had an overall positive impact for in-person recruitment. As a complementary strategy to increase my success in recruitment, I now could quickly refer to preexisting digital traces of my identity as a researcher. However, I also realized that under no circumstances could recruitment from afar compensate for the endless possibilities of in-person recruitment shaped by random introductions and interactions with interlocutors—particularly those who I never would have been able to reach by telephone or email.

NAVIGATING ACCESS: TRUST BUILDING AND SECURITY ISSUES IN VIRTUAL INTERVIEW SETTINGS

Another aspect that required additional reflection and mitigation when I went online concerned trust-building and security processes. During in-person fieldwork, I already had implemented extensive safety procedures for interlocutors who face political, social, legal, or psychological risks by partaking in the study. With the transition to virtual platforms, I realized that additional steps were necessary to ensure that interviews went well. When I began a virtual interview without an understanding of additional mitigation strategies, I observed significant differences in the depth and breadth of responses. The interlocutors' answers were briefer, and there were fewer opportunities to ask follow-up questions online. I realized that the virtual environment and the set structure of the appointment that took place within a specific time frame posed artificial constraints on the interview experience. Furthermore, establishing a relationship with interlocutors proved particularly difficult because the process was devoid of what often is perceived as less-important chit-chat before and after an interview.

To establish interpersonal relationships requires trust building, so I introduced dedicated time for informal conversation before the interview to create an opportunity for these exchanges. Specifically, I used the first 5 to 10 minutes of the interview for informal conversation during which research participants could

ask questions before the interview began. I noticed that trust building was easier to establish when interlocutors learned more about me and my research during this time, which is why I encouraged them to ask questions. Although this initial time proved useful, I also ensured that interlocutors felt comfortable during the actual interview. Online interviews often are conducted from a participant's private space, which can be interrupted by family members, pets, or telephone calls. In an effort to make the process feel more natural, I encouraged my interlocutors to embrace any interruptions whenever necessary. As a result of not sharing a common physical space with my interviewees, I also sharpened my observational skills to recognize nonverbal cues that signaled their needs. This growing awareness around shifts and changes in the virtual behavior of research participants allowed me to make suggestions, such as taking a break or rescheduling the interview.

In addition to these online trust-building procedures, I noticed that security concerns due to the sensitivity of my research topic were further amplified in virtual settings. Sensitized to security issues voiced during previous rounds of in-person research, I proactively pursued an open conversation with interlocutors about emergent online safety needs. For instance, I offered participants the choice of which end-to-end encrypted provider they wanted to use for the interview by informing them of the advantages and disadvantages of each platform. Another way to mitigate these issues was to directly address and discuss fears about digital surveillance to ensure that interlocutors understood that I cared about their security. Yet, despite these attempts to make them feel more secure while conducting online research about authoritarian states that increasingly use digital threats to repress and control dissidents in the diaspora, this proved particularly challenging.⁴ Some participants appreciated my openness and frankness about these issues; other participants decided to withdraw from the study.

These experiences resonated with my previous in-person research experience with vulnerable research participants. Nevertheless, the experience of virtually developing relationships with interlocutors positively impacted my skills as a researcher when I returned to in-person fieldwork. In particular, I found that I had become more cognizant to observing nonverbal cues during interviews and that interlocutors appreciated a frank conversation about emergent security issues during in-person interactions. This again demonstrated what can be gained by moving from in-person to virtual interviewing (and vice versa).

NAVIGATING DIGITAL ETHNOGRAPHY: CHALLENGES IN TIMING AND SPATIALITY

The third aspect that required additional reflection when interviewing online concerned conducting ethnography mediated through digital screens (i.e., digital ethnography).⁵ During in-person trips to the field, I had valued political ethnography as a method that allows researchers to obtain a deep sense of a person's everyday behavior, feelings, and relationships by observing and reflecting on their activities (Schatz 2009). In the field, ethnography often is constrained by the timing of fieldwork, and the opportunities (i.e., events and people) that a researcher comes across naturally limit the ability to control or plan research encounters. It is an illuminating undertaking, in which hints, intuition, and sheer spontaneity shape the trajectory of research

in a given moment. Throughout the COVID-19 pandemic, however, in-person ethnography had become impossible. I quickly recognized the existence of digital ethnography and started using it in my research as an alternative tool.

Transitioning to digital ethnography, however, required additional reflection on changes around spatiality. This allows the ability to take in visual experiences of space along with conversations—listening to, delving in, and experiencing the entirety of the

The pandemic demonstrated that our discipline needs more flexible approaches to fieldwork that encourage researchers to consciously embrace small and large disruptions and to apply broader adaptivity in the field.

context in which a researcher is embedded during in-person ethnography. As members of Turkey's diaspora went online to continue their activism during the pandemic, I observed key differences between in-person and digital ethnography. For instance, when I watched a livestream of an alternative protest at home or an event that was livestreamed due to a limit on the number of in-person participants, there was no way to interact with participants. Moreover, once the livestream was over, there was no way to continue the experience, move to another venue, or further engage interlocutors. Although I was grateful to make some observations from afar, it was a downgrade from a holistic ethnographic experience to one that was limited and uncontrollable. Many of the key aspects of in-person ethnography (e.g., gaining additional insight into the world of my interlocutors) that would help me to make sense or have a better understanding of collective-action processes were virtually missing. However, given that I was working with vulnerable populations that deliberately exposed their activism online, I was thankful for whatever I could observe.

I therefore began to follow on social media outlets anyone that I could identify as an active member of Turkey's diaspora. I quickly became aware of a loss of control of my own time because the timing of livestreams and digital observation was very spontaneous. Within weeks, I was spending sleepless nights navigating the time difference between Canada and the field. I was following my interlocutors everywhere and whenever I could: in transit, during dinner time, or even late at night in bed. A difference in time zones further complicated my relationship with digital ethnography. This placed an unusual burden on me because the field became ungraspable and merged with my daily life and responsibilities, which sometimes affected my mental health and personal relationships.

Taking a step back, I reminded myself that even during in-person ethnography, a researcher could not be everywhere at the same time and that I had to pick and choose. With this new insight, I noticed adjustments in my behavior as a researcher when I returned to the field; I was more accepting of issues around timing both online and offline. Learning from the digital experience, I fully embraced the need to pause, prioritizing my mental health by consciously choosing in what I would and would not be involved. Returning to in-person ethnography after conducting digital ethnography also taught me that sometimes we cannot mitigate all emergent issues and simply must accept that

in-person fieldwork (i.e., the “zag”) is necessary to complete certain types of research.

CONCLUSION

As I reflect on my experience of “zig-zagging through the field,” I am reminded of how rigid and static my imagination of the fieldwork process was when I first began my research. Although research interruptions were addressed tangentially in my methods

training as a political scientist, no preparation would have been sufficient to navigate the disruptions to fieldwork caused by the COVID-19 pandemic. The pandemic demonstrated that our discipline needs more flexible approaches to fieldwork that encourage researchers to consciously embrace small and large disruptions and to apply broader adaptivity in the field. In this article, I use “zig-zagging” (i.e., going online and then offline) as a metaphor to illustrate this rethinking of the fieldwork experience. Future methodological debates should consider the unprecedented research interruptions caused by the COVID-19 pandemic as a seismic shift for rethinking how we teach qualitative research, in theory and in practice, to future cohorts of political science.

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CONFLICTS OF INTEREST

The author declares that there are no ethical issues or conflicts of interest in this research. ■

NOTES

1. The extension of funding, however, often was preceded by graduate students' demands to receive additional funding and extension to their funding periods.
2. “Zig-zagging through the field” is used as a metaphor that advocates for an adaptive approach in times of unexpected research interruptions. Whereas this is a standard practice used in other disciplines (e.g., anthropology and history), I borrow and build on this idea to encourage political scientists to assume this practice more openly and forcefully when needed.
3. “Authenticity” is a problematic and loaded term in the social sciences. However, in the context of this article, I refer to it as “authenticity as a researcher” and reflect on issues arising from the loss of physical positionality in the field.
4. “Digital transnational repression” is a term coined by the Citizen Lab. See <https://citizenlab.ca/2022/03/digital-transnational-repression-explained>.

5. Digital ethnography is understood as the use of digital tools such as “online questionnaires, digital video, social networking websites, and blogs—and their potential impacts on the research relationship” (Murthy 2008, 839).

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