

Chapter 21: Qualitative Social Media Methods: Netnography in the Age of Technocultures

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Introduction

In 2021, as COVID created lockdowns and forced lockdown technology solutions to work and social activities, about 54% of the world’s population uses social media, with 4.15 billion people using it on their smartphones and spending an average of 145 minutes a day with it (Tankovska 2021). These numbers are impressive and represent one of the fastest and most far-reaching technology adoptions in history—even though they still exclude large percentages of the world’s population. For a majority of people on this planet, however, everything from learning a new recipe to shopping to keeping in touch with family and friends has been altered by the technologically mediated ability to connect, find information, and communicate. Social media interaction and information have also become intrinsic to the way people around the world learn about and engage with the news, influencers, social movements, and activism (Leong, Pan, Bahri, and Fauzi 2019; McCaughey and Ayers 2003). Social media are now one of the most important ways people interact not only within personal social networks, but with other groups, the economy, the polity, and with society itself. From filter bubbles to echo chambers, a range of recent scholarship links contemporary rises in populism, social division, and polarization with the increasing influence of social media (Graham Bruns, Angus, Hurcombe, and Hames 2021; Gustafsson and Weinryb 2020). As the global pandemic waxed, waned, and waxed again, the depth and significance of these transformations increased.

An essential concept for understanding these changes is the notion of technocultures. Technocultures are the technologically inflected elements of the complex mosaic of ways of life and resources constituted by different, overlapping, and sometimes conflicting cultures such as ethnic cultures, political cultures, organizational cultures, and subcultures (Kozinets 2019, Penley and Ross 1991). These technology tweaked ways of life and their accompanying resources thicken people’s life plots. They provide pathways that are rich with new meaning and tools that carry powerful capacities for novel action. You may be familiar with contemporary expressions of technoculture such as selfies, emojis, influencers, and memes, which combine with

other cultures such as national, ethnic, and political cultures to create new meanings and capabilities. On an even larger scale, networked platforms like Facebook and Twitter also incite, influence, and express technocultures, which is one key reason that they have become political hot potatoes around the world.

Technocultures provides radically new questions and topics. They also alter researchers' abilities to investigate. Disciplines including medicine, media studies, human geography, organization studies, cultural studies, travel and tourism, anthropology, psychology, accounting, health communication, marketing and consumer research, education, and many more, are grappling daily with a new reality in which social media use is changing the way people think, work, and live as patients, audience members, travelers, citizens, employees, ethnic groups, taxpayers, students, consumers, and much more. Researching technoculture by using data from social media presents scholars in these fields with immeasurable opportunities to understand these changes. The use of related technocultural topics and social media data also broadens these researchers and fields by connecting them to other researchers and scholarly fields that are investigating related phenomena. Understanding these topics and working with this data requires a cultural perspective and the cultivated techniques of qualitative research found in the ethnographic perspective. In this chapter, we will talk about the foundations and current practice of ethnographic research that *uses social media data* and that also *focuses on social media related experiences*.

Based in the practices of ethnography, *netnography has become the most recognized method for conducting qualitative research on and of social media*. Netnography is the name given to a specific set of related data collection, analysis, ethical and representational research practices which use immersive online experiences and online traces collected from social media to produce cultural understanding (Kozinets 2015, 79). We could say that netnography is a specific type of research performance. And, like many performances, it can be done well or poorly, depending upon the skill and knowledge of the performer. With this brief introduction completed, the purpose of the next section of the chapter is to explain and illustrate some of the challenges faced by researchers who seek to apply ethnographic social media research methods such as netnography and the possibilities that this type of research holds.

Ethnographic Research on Social Media: Challenges and Opportunities

In the prior (5th) version of this handbook, Internet research pioneer Annette Markham asserted, correctly, that internet scholarship and social media play a critical role in defining what currently counts as experience, what is considered as evidence, what has meaning, whose stories are told and how they are told, and how people are presented in those tellings (Markham 2016). Her goal with that chapter was to raise awareness of the epistemological, ethical, and political challenges for scholars seeking to study social life in contemporary times. Our chapter is a type of companion piece to, and continuation of, Markham's prior work. Building on Markham's important statements that much of the world is undergoing technological and other transformations—as recent pandemic times have dramatically underscored—we offer a rigorous and systematic way to engage in research that focuses on these topics using social media as the key site for these inquiries.

As COVID-19 challenged many qualitative researchers to continue conducting their studies, numerous students and researchers turned to online contexts to continue their research. However, these contexts are not hassle-free. We will emphasize three key challenges to the conduct of ethnographic research on and of social media: data overload, decontextualization, and ethics. What makes these challenges well worth facing are the genuinely exciting prospects for new knowledge. Surprisingly and regrettably, there are still relatively few fields where the scholars are rising to these challenges. We hope that the information in this chapter can empower a new generation of scholars to take up this most necessary gauntlet.

Because technoculture is such an important and embedded part of many people's daily lives, as Markham (2016) details, dealing with the sheer amount and variety of data available on social media presents the first serious challenge. And because we have been using the term data to explain matters, a definition that clarifies exactly how we are using the term might be in order. Data are informational raw materials that are selectively observed, co-created, or collected as part of an investigatory process (Kozinets 2020, 191). Netnography often involves collecting online traces which can be textual, graphical, photographic, audio, video, or any combination of these. When these traces are collected as part of a research project, they become data. Qualitative research seeks to maintain as much of the rich cultural contexts of data as possible, regardless of its format. Data collected by a qualitative researcher with this intent to maintain the richness of cultural context is what we mean by the term "qualitative data".

The act of finding and saving prodigious quantities of social media data is easy. That ease, in a nutshell, is also the challenge. Any researcher today can go online and, with minimal effort and a few easy-to-use software tools, scoop up massive amounts of data. What comes next, however, is much more demanding. Making sense of millions of downloaded words or images is onerous and difficult, as is ensuring that they are relevant to a particular project. As a result, quantitative methods such as text mining, natural language processing, and automatic data analysis are often used to handle the resulting quantities of data. The results are disappointingly *un-ethnographic*! We believe that this challenge—and the lack of awareness of rigorous qualitative research strategies to face it—has led to the large-scale quantification of academic research on social media and the current popularity of big data and analytics driven approaches.

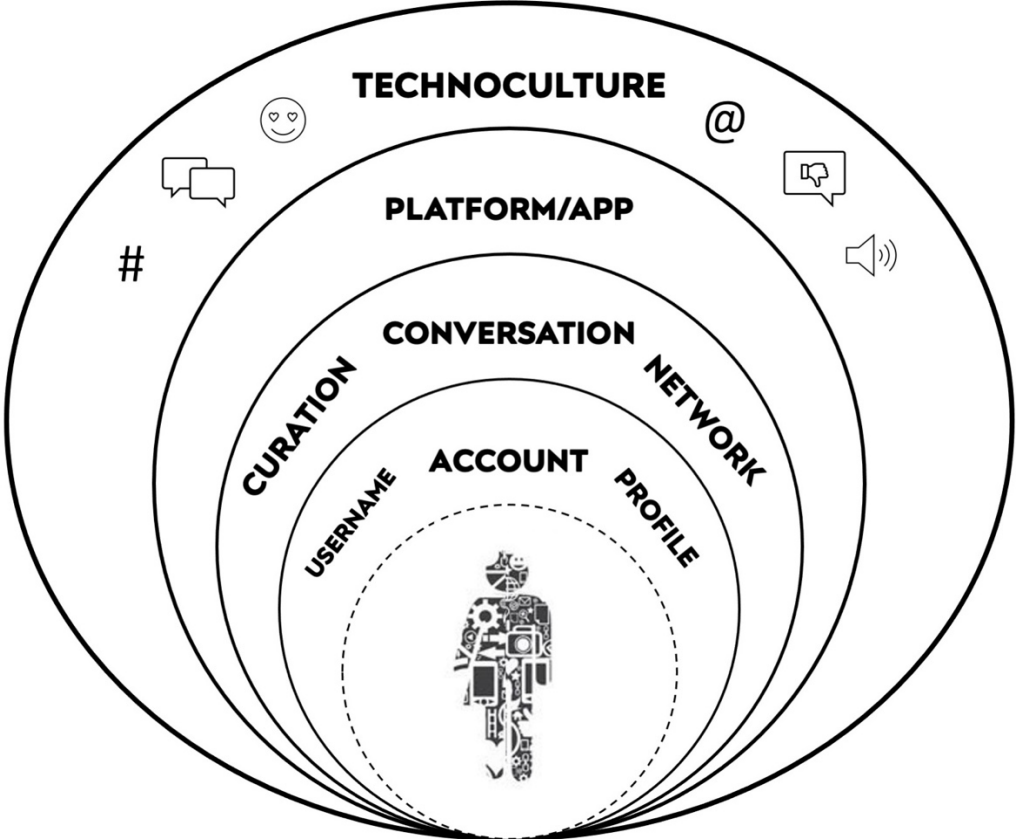
Data overload leads directly to the second challenge, decontextualization. Big data analytics can of course be used to study social media data. But social media is a human experience, not a technological one. It is meaningful to people because it contains rich cultural information which is difficult or impossible for machines to comprehend in any but the most superficial ways. Online interactions are social phenomena, culturally embedded exchanges, and interlinked conversations whose meanings draw from their rich contexts every bit as much as any other communication. However, there are important differences between online communications and other types of communication such as face-to-face verbal exchanges.

The interactions that occur on social media platforms such as YouTube or Instagram are filtered through machines, controlled by corporations, digitized and abstracted. Social markers such as gender and identity become fluid concepts online, deception is easy, and the trustworthiness of a communicator is often difficult to judge. Familiar sociocultural contexts such as physical locations and ethnicities can become replaced or annexed by technocultural ones, such as

platforms and users' profiles and tags. And much of the communication is accessible to the public, easily shared and interlinked through hashtags. This makes technocultures more dispersed and accessible than any culture of the past ever was, and potentially more diverse and contested. The networked communication space is altered technologically (by characteristics such as social media platform functions), culturally (by user norms, meanings, and language that exist prior to and that emerge through social media use), and technoculturally, as these elements combine.

Online interactions are embedded in these technocultural contexts. Figure 1 illustrates the embeddedness of online interactions. Starting in the innermost circle, individuals and organizations become users that interact through accounts, which are represented through usernames and more or less elaborate user profiles. As they interact with one another and with platforms and platform content, they produce digital traces (some of which are visible to general public users). Their digital traces become part of data streams, feeds, and threads, which form the next level of embeddedness. The streams, feeds, and threads constitute networks, conversations, or curations. These are in turn integrated and tightly interlinked with the structure, underlying business models, and the resulting ethos of the website, platform or application that hosts the interaction. All these layers simultaneously give rise to and are influenced by technoculture.

Figure 1: Embeddedness of Online Interactions



Capturing this embeddedness in one's research is a great challenge. Social media data become decontextualized from their creators and audiences, first, by the act of posting them on platforms, second, by the act of the researcher extracting them from that ecosystem, and third, by the abstracting acts of analysis. The result is that social media data easily lose their social contexts as living, breathing, cultural conversations and acts of sociality. The risk for research is that they can easily be treated as mere bits of raw data to be manipulated. Bringing a cultural understanding to this easily-decontextualized reality is why an ethnographic sensibility is valuable—and necessary. Ethnography provides the epistemological guardrails that can keep researchers focused on the significance of the research participants' perspectives and realities that remain embedded in the data.

Related to this vital need to keep the human experience central to our understanding of social media is the third challenge, ethics. Even though social media research often uses publicly available data, the range of ethical issues and questions it prompts are challenging. For example, who owns a social media post? Is it permissible to simply quote online posts and posters, or does the researcher need permission—and from whom? Given the philosophical and axiological underpinnings of ethnographic and qualitative research, researchers who apply these perspectives to social media contexts have a particularly acute ethical responsibility to uphold high standards.

Across philosophy and the social sciences, there is a long history of technology research that bakes in assumptions not only of technological determinism but also of dehumanization and anti-social viewpoints accompanying the use of advanced technology such as social media. However, the humanistic and critical perspectives of ethnography provide powerful antidotes and challenges to these assumptions. People often use technologies to better themselves and to attempt to better society, but these attempts can be stymied and subverted by technological characteristics and capacities; technology and culture intermingle and codetermine one another in ways at once fascinating and terrifying. These debates about the implications of social media us are currently among some of the most central ones facing our governments and societies.

The cultural sensibilities of ethnographers and other qualitative researchers—their attention to meaning, language, identity, and ritual—are needed to elevate the study of social media and their impacts beyond the brutalizing manipulation of decontextualized data. If we agree that technology platforms have become the 21st century's vibrant folkways of culture and meaning, then their study or the use of the data they produce necessitates the expertise of ethnographic researchers who can look at them as rich contexts for conversation and social interchange and recognize and interpret the embeddedness of data collected from them.

The next section of this chapter will explore the current status of ethnographic research on social media. Following this, we offer some basic epistemological and ontological assumptions. Then, we provide guidance for conducting this research, including a step-by-step overview of how to conduct netnography. A section detailing new developments and perspectives relating to the area comes next, followed by a conclusion section that points the way forward for this dynamic and increasingly important field.

How Social Media and Netnography Co-evolved

There was never a time when media were not social. We can see the origins of social media in the early days of toy printing presses and fanzines, CB and ham radio movements (Kozinets 2020, Kozinets and Jenkins 2021). With the advent of home computing, the World Wide Web and the first browsers, the early 1990s marked the beginning of social media as we know it. The writer Howard Rheingold (1993) applied ethnographic techniques to study the social media of the time and popularized the term “virtual community”. That term captured the zeitgeist at the time, which was that these new forms of communication were also an important new form of community. To study this novel type of community or “cyberculture” (another popular term at the time), it made sense for scholars to adapt existing methods for studying cultures and communities. Scholars Henry Jenkins (1992, 1995) and Shelley Correll (1995) began using the terminology of ethnography and applying ethnographic techniques to their investigations.

Those early investigations contained revealing insights about the usefulness of these methods to study two separate types of topics. First, ethnographic methods were useful for studying general topics, such as media fandom or sexuality, which were being discussed in illuminating and accessible ways in the virtual communities. Second, these methods revealed, explained, and descriptively recorded, as little else could, the novel technocultural forms and changes of these burgeoning forms of social media.

Over the years, social media changed. It developed from the smaller, topically based, user-moderated “virtual communities” of newsgroups, bulletin boards, and chat rooms to wildly popular and far less communal blogs to the massively scaled platforms of powerful multinational technology companies such as Facebook, Microsoft, Google, ByteDance, and Tencent. This massification and commercialization of social media in large platforms changed the game, as the “virtual communities” existing outside of the large platforms have become substantially rarer (Kozinets 2010, van Dijck 2013). The marketization and commodification of social media conversations, identities, and data streams brought about by these platforms impacts access, data ownership, and privacy in critical ways (Zuboff 2015)—and therefore impacted the kind of data available for research.

Technology platforms commercialize the attention of the people who posted on platforms, sorting them into convenient groups that can be targeted for advertising (such as gay consumers, see Campbell 2005). At the same time, the unrepresentative uniformity on these sub-groups invited discourse that became increasingly polarized, politicized, and extreme (Howard, Ganesh, Liotsiou, Kelly, and François 2019). Moreover, social media was weaponized by governments and bad actors to influence public opinion and sway elections (Singer and Brooking 2019). Bots and other non-human actors, like algorithms, further complicated the social media sphere (Lugosi and Quinton 2018). This short overview touches on some of the most important topics for social media research today, which revolve around commercialization, marketization, polarization, datafication, surveillance and privacy, politicization, misinformation, militarization, and dehumanization.

Research methods must continually re-attune to rapidly changing socio-environmental changes such as COVID-19—and also to technical realities. Technological bandwidth expands, as does

the functionality of increasingly ubiquitous and interconnected mobile phones and other smart devices. Whereas early social media researchers primarily worked in verbal “text”, most messages today have visual, graphical, audio, and audiovisual components. From podcasts to TikTok and YouTube videos, Pinterest boards to Instagram and WeChat files, ethnographic researchers of social media must become technologically adept, able to collect and interpret the multiplicity of forms of social media communications. For example, some aspects of online communication were once considered relatively permanent, such as messages which, once posted, lived on for years. However, many social media communications today have become increasingly ephemeral, as embraced in affordances such as the disappearing Snapchat or the temporary Instagram Story. This makes ethnographic data collection challenging, because messages that were spotted during online research today may have been removed or replaced when tomorrow comes.

Netnography is a specific set of data collection, analysis, ethical and representational research practices that have evolved in these circumstances. It developed in the age of virtual community to study online fan and other brand and product usage communities. But the practices have evolved as researchers across multiple fields and disciplines systematically expanded and adapted them. Netnography’s procedures adapted to the age of blogs and their increasing commercialization of online culture. Then, they adapted to the social media platforms with their massification, visual affordances, attention-seeking algorithms, and network driven business models.

Because social media are complex cultural phenomena that can be challenging to study ethically and effectively, researchers need well-defined research practices, not just general advice. Foreknowledge of the social media context and operational consistency are important to a rigorous netnography approach. Underlying these procedures is a solid grounding in methodology. As our next section will discuss, ethnography’s methodological depth is the foundation upon which netnography builds its assurances of rigor.

Methodology: Ontology, Epistemology, and Axiology

Ethnography has often been compared to the act of writing (Anderson 1986, 69-71; Clifford 1983; Marcus and Cushman 1982) because the products of ethnographic fieldwork are reflexive, subjective, constructions of language. The interpretation of ethnographic fieldwork is like translation, as the phonemics of emic cultural insiders are converted in the phonetics of the etic scientists who compare and contrast them across cultural contexts. Although cultural interpretation is a linguistic enterprise, it is grounded in the belief in some real, and yet socially constructed, world outside of language.

There are a variety of ontological positions that can be assumed within ethnography, from the omnipotently objective assumptions of realist ethnography to the multiperspectival and reflexive underpinnings of experimental and post-structural ethnography (van Maanen 1988). Like ethnography, netnography has different varieties (Kozinets 2015). Auto-netnographies might express researchers’ more manifold, malleable, and reflexive viewpoints on reality, such as the

LGBTQ meanings that Jenkins (1995) found in fan postings or through which Boellstorff (2008) interpreted his experiences in the *Second Life* virtual world. But all netnography assumes that there is a real social world outside of its construction through language.

The epistemology of many netnographers—the way that they know things, the basis for their claims of knowledge—is the valuing of “a human-level interpretation, recognizing the layers of humanity operating behind and thought-forms represented within the technology” (Kozinets and Nocker 2018, 132). The primary task of these netnographers, as of many ethnographers before them, is to help build and share an understanding of the lived experience of particular human beings.

Netnography studies two types of cultural phenomena. One is general topics that exists in the social world, independent of the social media platforms people use to discuss them. For example, Ninan (2021) used social media data to learn about construction safety issues in India and Belazas and Daniel (2021) used it to understand how innovation based in sharing economy business models helped to overcome challenges from the Covid-19 pandemic. The other type of cultural phenomenon that netnography studies is technocultural and more directly related to social media use itself. As examples, consider how Lever, Elliot and Joppe (2021) used Facebook posts and interviews to study how residents of particular localities use social media to advocate for their cities as travel destinations and how Whitson (2021) studies the ways indigenous activists use Instagram to address discourse about construction and colonialism and intervene in environmental injustices.

The understanding gained from netnography is specific. It usually deals with phenomena—things like foodporn, play, and selfies.¹ It is idiographic rather than nomothetic, bound in time and dependent on particular contexts. Because human society, and especially technoculture, are highly dynamic, we can think of this understanding more as a part of a process of uncovering than as an end point. Netnography is not about building *the* understanding of a particular phenomenon, but *an* understanding (Denzin 1988). That understanding is the distinctly social scientific enterprise of *Verstehen* (Wax 1967). In netnography, *Verstehen* refers to seeking a full comprehension of the core phenomenon being studied—for example, the worlds of food culture, photography, and pornography—and then, in addition, studying and grasping *the additional* and *conjunctive* shared meanings of influencers, platform functions, attention-based algorithms, netiquette rules, rituals, emojis, online reviews and recommendations, and other relevant cultural and technocultural contexts and elements (such as we would find in a study of the foodporn phenomenon; see Kozinets, Patterson, and Ashman 2017).

Despite their superficial dissimilarities, netnographies all have common elements that unite them. The AI-assisted netnographies performed for business clients by the German innovation firm HYVE, for instance, seek to provide richly detailed portrayals of consumer tastes (Marchuk, Biel, Bilgram, and Jensen 2021). This work uses experienced human researchers to identify consumer data and interpret the patterns and linkages to help reveal unmet customer needs. On

¹ The term “foodporn” or “food porn” refers to food objects, often of the extremely delectable or deliciously extreme variety, their presentation in still photographs or video images, and also “the increasingly common practice of photographic food for social network or public sharing” (McDonnell 2016, 240).

the other hand, a netnography such as O’Leary and Carroll’s (2013) study of the online poker subculture provides richly contextualized descriptions of an ethnographic journey, satisfying Hobbs’ (2006, 101) definitional requirement that an ethnography offers the reader a look into “the intense meaning of social life from the everyday perspective of group members”. The commonalities between the approaches are important. Both studies deploy the same procedures for data collection, analysis, and representation. They are specific in their focus. They use online traces collected from social media. They focus on the importance of immersive online experiences by the researchers. They are committed to detailed, appropriate, up-to-date ethical practices. They highlight contexts and derive contextually based knowledge. And their goal is to produce deep cultural understanding.

The axiology of netnographers and their studies can vary, just as those of ethnographers and their ethnographies do. Like ethnographers, netnographers have a long history of seeking to explore important social topics using a critical, reflexive lens and an emancipatory focus. For example, West and Thakore (2013) expose the racial stereotyping, exclusion, and discrimination practices present in social media exchange and suggest important alternatives and needed changes. Providing another example, an international team of netnographers investigated how multinational tobacco companies were using social media to promote smoking among global youth and sought to use the findings to affect policy at social media companies and international regulation and enforcement (Kozinets, Gambetti, Gretzel, Suarez, and Renzulli 2021). Netnographies can be deployed, just as ethnographies are, for a variety of purposes.

Virtual Ethnography, Digital Ethnography, and Other Approaches

We mentioned above that ethnographic labels, perspectives, and techniques have been applied to social media research since the 1990s. In fact, there are numerous approaches based on the fundamental idea that it is worthwhile to apply traditional ethnographic methods to technologically mediated contexts. Early work, such as Jenkins (1992) and Correll (1995) simply called their work ethnography, performed the research, and provided rudimentary explanation about their adaptations. But then other authors began developing their own versions of social media ethnography. These versions were different from one another—although the differences were rarely explained—and they were given several different names.

While netnography was the first of these named versions (in 1996), there are also cyber-ethnography (Ward 1999), virtual ethnography (Hine 2000), network ethnography (Howard 2002), online ethnography (Markham 2005), and digital ethnography (Murthy 2008; Pink, Horst, Postill, Hjorth, Lewis, and Tacchi 2016). Some of these approaches, such as netnography and virtual ethnography, provide more detailed descriptions about the research performance that have helped direct numerous studies that cite and use those explanations. Others contain less detail and have gained more limited followings. Some, like webnography (Puri 2007), have very limited descriptions and followings and are not included in the overview. As stated above, we can consider each of these approaches to be a type of research performance that has its own unique type of language, modality, and orientation. Table 1 looks at some of the most common ethnographic approaches to technologically mediated contexts and compares them on six aspects.

Table 1: Differences between ethnographic approaches to technologically mediated contexts

Approach/ Aspects of Approach	Focus of study	Amount of methodological detail (philosophy, ontology, epistemology)	Reliance on social media data (extensive or only partial?)	Method guidance (how well defined and specific?)	Ethical research guidance (rules for conduct)	Adaptation to ongoing social media change (for example, new platforms and devices)
Netnography	General topics present in social media interactions, and topics relating directly to social media and its use	Extensive	Extensive, along with social media interactions	Detailed process with specified steps, movements, and priorities	Extensive	Extensive and enduring
Cyber-ethnography	Virtual communities	Limited to reflexivity	Yes, and interviews	Exclusive focus on online interaction	None	None
Virtual ethnography	Significance of the internet and study of the internet in use	Very Extensive	Requires supplementation by in-person research	General and flexible applications of ethnography	Limited to general guidance	Some
Network ethnography	Hypermedia organizations	Some, focused on technological determinism and agency	Yes, and social network analysis	Limited to using social network analysis for ethnographic site selection	None	None
Online ethnography	Computer-mediated construction of self, other, and social structure	Extensive, focusing on othering	Extensive, emphasizing text and textuality	Minimal, prefers to focus on epistemological and methodological questions	Philosophical questioning	None
Digital ethnography	Digitally mediated contact	Some	Requires supplementation by in-person research	Open-ended and flexible applications of ethnography	Limited to general guidance	Some

It might seem at first blush that the many names for a similar technique are yet more proof that academic fields are like the Bible’s famous Tower of Babel! But, as Table 1 indicates, the different approaches vary in some important ways. For example, the term “virtual” in virtual ethnography relates to the idea that this virtual ethnography was seen as a “disembodied” form of ethnography, a sort of disadvantaged cousin to real ethnography that is inadequate for many “practical purposes” unless it is combined with physically present ethnography (Hine 2000, 65). Virtual and digital ethnography share this sense that social media data must be combined with “offline data”, a move that they align with the concept of multi-sited ethnography.

Netnography, in contrast, would find a study that uses only social media data to be entirely adequate *if that approach was aligned with an appropriate research question* (for example, what do message posters discuss on diabetes related Facebook groups?). Netnography thus considers

the question of social media data versus data collected in person as a sampling decision. In a wired world, what is “offline data” anyways? If the research question or area of interest is about communication, representation, media, or markets, then it may not be necessary to sample outside of social media information. If, however, the research question focuses on a group or activity not clearly expressed on social media, or only partially expressed there—for example, a broader study of Hong Kong-based social movements—other methods or types of data will likely be necessary.

On matters of ethics, virtual ethnography, online ethnography, and digital ethnography offer extremely broad guidelines, such as telling the researcher to follow relevant ethical rules and not to deceive people. This generality (e.g., “do no harm while researching”) helps ensure that the advice does not go out of date. However, the result of all this highly unspecific openness and flexibility can be quite dangerous to researchers trying to work (and get ethics approvals) in a complex context such as commercially owned social media platforms. The performance of netnography is much more detailed and fastidious when considering research ethics—as future sections of this chapter will explain.

Cyber-ethnography (Ward 1999), online ethnography (Markham 2005), virtual ethnography (Hine 2000) and digital ethnography (Pink et al. 2015) embrace the openness of ethnography and do not provide detailed expositions or practices, as per Hine’s (2000, 13) assertion that the strength of virtual ethnography lies in “the lack of recipes for doing it”. As more open type of research performance, these approaches emphasize the flexibility and adaptability which that autonomy provides. Researchers seeking to conduct virtual ethnography, digital ethnography, online ethnography, and cyber-ethnography should thus not expect much in the way of specific how-to style advice. As the next section will discuss in more detail, netnography is different.

Five Advantageous Differences of Netnography

Netnography proceeds from different assumptions than the methods mentioned above. Its explicit but non-binding guidelines and practices give netnography five clear advantages over other approaches such as virtual ethnography or digital ethnography. First, they offer *clarity*. Ethnography does not have one obvious adaptation to the complex space of online platforms and discourses, and many methods leave the online ethnographer to figure out for themselves how to conduct their work. But the methodological writing about netnography breaks the process down into steps—six clear and well-defined research “movements”—and specific operations that can be performed within these movements. Because it has been developed to emphasize clarity, netnography is relatively easy to explain and to teach to newcomers—as you will see in the next section of this chapter.

This unambiguous approach leads to the second advantage, *comparability*. There are thousands of netnography using articles, chapters, and dissertations currently in print in almost every scientific field, including medicine, mathematics, and psychology. This strong base of published and peer-reviewed research, which includes many top tier scientific journals, provides a strong basis of comparison that new and experienced scholars can constantly draw upon in their own

investigative work. Further, the term provides methodological clarity about what was done in the research and why it was done. When researchers use netnography and its terminology, and cite other works of netnography, both methodological and substantive, they are signaling to their editors, reviewers, and readers precisely which procedures they followed to conduct qualitative social media research. This makes their work commensurate on a methodological level.

The *compatibility* of netnography with multiple other methods, fields, and approaches is its third advantage. Many other ethnographic applications, such as virtual ethnography, remain closely linked to the perspective of particular research fields, especially sociology and anthropology, and exclude all others. Netnography draws upon and connects with a range of fields, including media studies, communication, and computer science. This breadth also means that the use of netnography can encompass other techniques, such as quantitative sociology, social network analysis (Kozinets 2015; Roland, Spurr, and Cabrera 2017; Whelan, Teigland, Vaast, and Butler 2016), content analysis, discourse analysis, thematic analysis, and narrative analysis. Its broad and multiperspectival base, as well as its current grounding in a range of fields, makes it relatively easier to welcome the collaborations of interdisciplinary projects.

The fourth advantage of netnography lies in the ethical quality of the *conduct* that its disciplined approach provides. Research ethics in online environments are notoriously difficult to deal with, but urgently important. Human subject research reviews and IRBs are often (and we find it sad but necessary to say this) clueless when it comes to online qualitative research. There are also legal restrictions, such as the European Union's GDPR Regulations, which are dynamic. That is why netnography has strict, well-defined, and up-to-date procedures regarding how to conduct and to publish ethical research on particular social media platforms across international contexts. Because technology use in research is an important and dynamic field, these guidelines are demanding, exacting, and constantly evolving.

The final advantage in netnography is *creativity*. Every method can be adapted to particular circumstances, but that customization is greatly assisted by the presence of a foundation composed of clearly understood procedures and explanations. Because netnography presents clear and explicit protocols, researchers paradoxically gain the freedom to expand its boundaries to adapt to particular contexts and new challenges (Kozinets and Gambetti 2021). Thus, a research team that is studying how TikTok influencers spread COVID misinformation might end up conducting a very different type of netnography than another group that is investigating how Turkish mothers use Facebook parenting groups to subtly discuss political matters. The customizations of netnographic method that each of them might perform would be directed both by a knowledge of prior related research, as well as a clear understanding of netnography's standard guidelines. In the next section, we describe these explicit protocols.

Steps and Priorities of Netnography

Netnography is “a form of qualitative research that seeks to understand the cultural experiences that encompass and are reflected within the traces, practices, networks and systems of social media” (Kozinets 2020, p. 14). Netnography is best understood as a process made up of a series of simple steps and priorities which are performed by researchers in the act of conducting research on social media.

There are three priorities in netnographic research, as shown in the bottom bar of Figure 2. The priorities color everything the researcher does throughout their netnography, from start to finish. The first priority emphasizes engagement. What makes a netnography ethnographic is a researcher immersed in a relevant social media phenomenon. A key term for netnography’s type of ethnographic immersion is engagement. Engagement is not the same as participation. Instead, engagement is “a reflective type of personal involvement in the focal phenomenon by the members of the research team or the individual researcher” (Kozinets 2020, 134-5). Engagement can be intellectual, cultural, historical, emotional and/or social (Kozinets 2020, 249-250).

Evolution –the requirement to adjust the particular study to the unique contingencies that face it—is the second priority. Evolution is what creates the flexibility in netnography to adapt to a new platform, online setting, or device, to perform netnography in a unique new context but still stay true to the core guidelines of netnography. These novel contingencies can include the type of online platform, the topic, national culture or language, particularities of a subculture or group, unique orientation of an academic field or theory, or just about anything else that might affect the focus, structure, or ethical stance of the research. For example, Maddox (2021) studied crypto markets on the Dark Web, which necessitated adaptations of immersion involving the use of encryption programs.

Ethical practices are the final of the three priorities. In netnography, the guidelines for ethical research conduct are quite detailed but always under revision as contexts such as global legislation and institutional norms adapt. We will have a sub-section dedicated to these ethical guidelines later in this chapter.

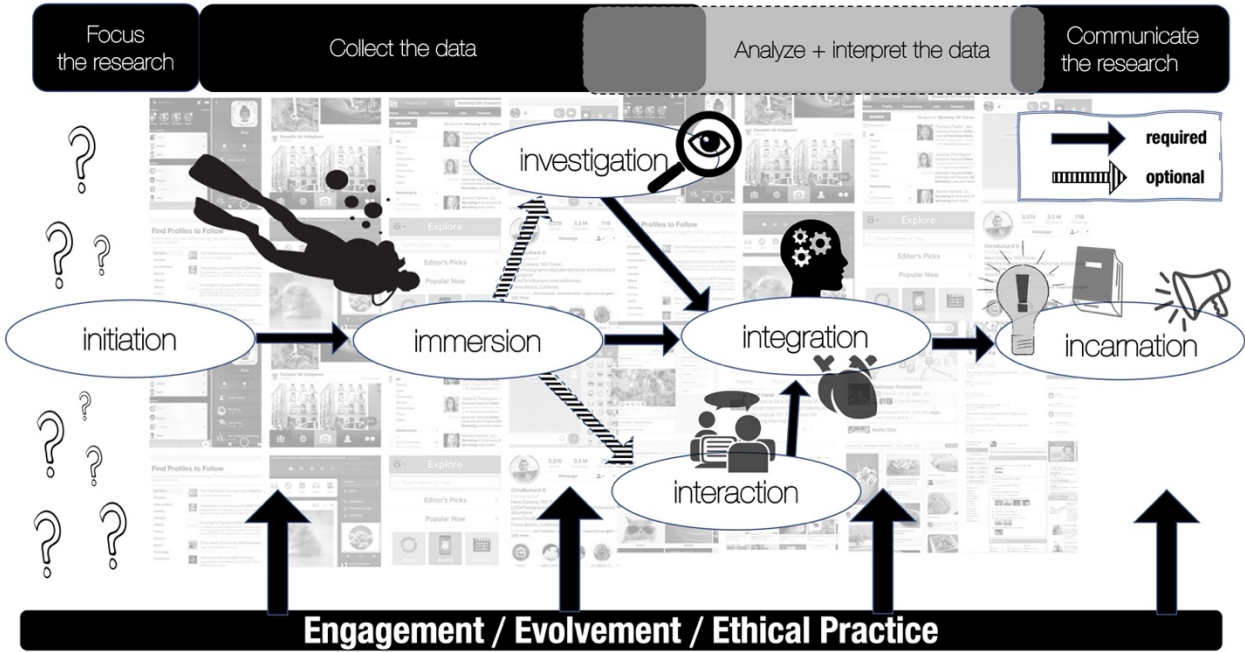


Figure 2: Netnography: Three Priorities, Four Stages, and Six Movements

Netnography takes place through four basic stages, as depicted in Figure 2. The stages overlap with one another and contain iterative pathways: focusing the research, collecting the data, analyzing, and interpreting the data, and communicating the research.

Within the stages are six discrete “movements”. Each movement has a set of research operations within it that guide the researcher, directing them through the actual practice of performing the research. These operations, which we do *not* detail in the Figure, contain specific procedures for things such as how to choose a research question that is appropriate to netnography, how to translate a research question into search terms, and how to save data.²

The first stage of a netnography (or any research project) is to focus the project on a particular topic and particular element of that topic which is theoretically or substantively interesting. The movement that occurs in this stage is called *initiation* because it initiates the netnography project. Netnography is not a good method to use when studying phenomena that are not represented or discussed on social media, or that have no other social media component. It is also not particularly useful for investigating matters that do not have a cultural component. As we see in Figure 2, out of a possible universe of many questions and types of questions, the researcher will narrow their focus into a particular and relevant area, often formalized as a research question. Following the priorities for netnography, the researcher will also begin at this stage to think about how best to adapt the basic netnography guidelines and operations to the unique contingencies of the context (i.e., evolvment), how to design a study that emphasizes researcher engagement, and how to design and explain the project so that it follows all applicable ethical rules—and attains the necessary ethical research approvals.

Netnography’s unique methodological focus lies strongly in the data collection stage, which is the second stage of a netnography project. In netnography, there are three distinct movements related to collecting data: *immersion*, *investigation*, and *interaction*. Only immersion is required. *Immersion* is the self-reflective and introspective development of the research as it occurs through the actions of an engaged researcher or research team. Immersion is captured in an immersion journal. The immersion journal is a recording tool that the researcher uses every time they engage in social media research. Each entry in the journal is dated and timed. Entries will include a variety of different kinds of information ranging from a straightforward recording of searches that were done and data sites that were scouted to personal reflections and extrapolations about emerging theory. Without immersion, and probably without an immersion journal to record and substantiate that immersion, the ethnographic quality of a netnography is absent. This is why immersion is crucial and non-negotiable in netnography. Some netnographic projects, such as auto-netnographies, are composed almost entirely of data derived from the immersion movement.

Most netnographers will also conduct a search and appraisal of data from social media platforms, which can be private or public. Netnographic research most commonly involves archival research of publicly available data, which could mean downloading posts written up to that moment. In most cases, the investigation movement takes place simultaneously with the

² Kozinets (2020) offers full descriptions, guidelines, and exercises to accompany all operations. We direct interested readers to this text.

immersion movement, as the search for relevant data sites and online traces forms a core topic of the immersion journal, and the immersion in these sites and their content informs the ongoing quest for data. The investigation movement structures this process of turning research questions into hashtags and other searchable terms, examining the results, selecting data and platforms for further data gathering, and saving the data in appropriate forms and places. Most netnographies include data collected from both immersion and investigation movements.

Often a research study will need to expand on the data available from social media sites. For example, you might be studying how Indonesian men discuss religion online but want to expand the discussion to discuss how often they engage in religious practices or how involved are their families—which they may not discuss on social media platforms. In cases such as these, the researcher(s) will want to reach out and contact and directly communicate with relevant participants. Interaction with participants can also be important when there is a need to verify that a certain kind of person actually is included in your research; positive verification can be difficult using only publicly available postings, which are often pseudonymous.

There are different ways that netnographers bring interaction into their research. Probably the most common is the use of interviews, which can include using online interviews (e.g., using Zoom or Skype), or in person, synchronous or asynchronous, textual or audiovisual formats. As with ethnography, interviews can offer the researcher additional insight into the mindset of people. Other options include the development and implementation of research webpages, mobile ethnography, or digital diaries. Again, not all netnography projects will require an interaction movement—but many do.

Integration is the name given to the movement that develops research analysis with a hermeneutic, semiotic, symbolic translation style of interpretation. Analysis is generally about breaking down the dataset into elements, assigning thematic codes to these elements, and then finding patterns in those coded elements. Interpretation tends to be more about looking for integrative wholes, comparing parts and whole, translating or comparing integrative aspects of the findings with other wholes, exploring interconnections, or using evidence to question taken-for-granted theories and assumptions. There is no specific type of qualitative data analysis distinctly tied to netnography, other than the injunction that all data analysis in netnography needs to be deepened and developed through cultural interpretation.

As depicted in Figure 2, there is quite a bit of overlap between the third stage of netnography—which involves analyzing and interpreting the collected dataset—and the stages before and after it. Netnography, like ethnography, is emergent. This means that analyses and interpretations may be cross-checked, refined, or refuted with further rounds of data collection. These further rounds might even end up altering the research focus or research question—which could ramify into additional data collection, analysis, and interpretation.

The final research product—whether a dissertation, a conference presentation, journal article, or book-length work—is fully realized in the final movement, *incarnation*. In incarnation, the researcher or research team will communicate the research findings in a manner appropriate to the method and medium. In fields where netnography is not well-known, the research method might require more explanation and background information. For example, even though screen

shots are often very necessary for netnographers to present their data, many publishers (citing copyright regulations) are overly restrictive about using screen shots in publications. Research fields have orientations, tastes, and languages. For example, some are more or less positivist, more or less quantitative, or more or less inclined to use visual images as data. The presentation of netnography and netnographic data may need to be adapted to its audience to communicate clearly. Netnography provides updated and relevant guidelines to help the researcher navigate these challenges. By following the three priorities, four stages, and six movements, the foundations of the netnography project should be clear and their rigor largely beyond dispute.

Conducting Ethical Research

As noted in the sections above, a central emphasis and a key advantage of netnography is its detailed attention to ethical research practices in the study of social media. This is a very complex area that is context-dependent and in continuous flux. We defer detailed explanation of the principles to Kozinets (2020) and especially to Figure 6.3 in the book, which provides a detailed ethics procedure flowchart, and Table 6.1, which offers a detailed explanation of key concepts in research ethics. To briefly summarize some of the main points relating to the appropriate performance of netnography, we highlight the following three research ethics concerns.

First, the nature of public and private social media data is currently unclear and shifting. This creates an uncertain atmosphere for the conduct of research. Beware of simplistic statements and guidelines. Much better is to recognize that ethical guidelines are context-dependent, where contexts are nations/regions, corporate platforms, and uses (e.g., for certain kinds of research)—and that these guidelines are also in flux. Researchers need to be aware of local laws, like GDPR, fair use, and fair dealing, and to work with appropriate institutional bodies to ensure that they can conduct their research ethically.

This ethical complexity does not mean that you necessarily need to gain permission from a platform like Facebook or from individual users in order to use data posted on that platform (something that has been nearly impossible in our experience). It does mean that you must recognize that the data on platforms like Facebook, Pinterest, YouTube or Reddit (even data you can access without logging in) is not *public property*. Most netnography does not extensively use data scrapers or data mining tools, and its implementation usually takes place on a scale similar to that of a devoted social media user. This means that netnographic research is far less intrusive and data-hungry—and less controversial and disruptive to platforms—than other methods such as big data. Usually, specific questions about data usage in netnography can be addressed with good information and guidance, but they should not ever be simplified or overlooked.

Second, researchers must gain informed consent where it is appropriate. Where there are closed or moderated groups, or where a personal interaction such as an interview or research page is being used, this automatically triggers the need for informed consent. Additionally, fair use and fair dealing regulations dictate that researchers can, under many circumstances, legitimately use screenshots from social media in their research presentations and publications.³

³ This right is not guaranteed, but based on relevant legal guidelines for fair use and fair dealing. Please consult with authorities on this topic for greater detail.

Third and finally, the representation of participants in the research must be ethically appropriate. This usually means anonymizing and pseudonymizing people's posts. Especially if the information is sensitive or the population is considered vulnerable, quotations may be altered so that they cannot be backwards traced in search engines to reveal the original post and message poster. Markham (2012) suggested and demonstrated the use of data "fabrication" where original data is creatively rewritten into composite accounts or representational interactions. In their study of sensitive credit rating discussions on social media, DuFault and Schouten (2020) effectively used this fabrication technique to create composite consumer verbatim that kept the original postings and message posters confidential. However, where important, a netnography may want to—and be entitled to—publish full quotes and actual screenshots of data, as is commonly done in many of the netnographies cited in this chapter.⁴

Evolving Netnography

Evolvement is the adaptation and customization of the procedures of netnography to fit its unique research challenges. Evolvement is not just a central priority for all individual netnography projects. It is also a type of core philosophy that has guided the development of the entire approach in the past and will continue to guide it into the future. We like to say that, about 10 years ago, as netnography started to catch on as a viable and valuable research method, netnography started to become crowdsourced. Crowdsourcing involves inviting interested people to voluntarily undertake a practical task, which they complete in aggregate for their mutual benefit (Brabham 2013). As COVID-19 altered the practical landscape for qualitative researchers, we noticed an increasing number of these customized developments and adaptations as the crowdsourcing of netnography intensified. The idea of evolvement institutionalizes the idea that netnography is a living, breathing method, an approach that adapts and changes based on transformations in the technocultural environment and through alterations made and shared by researchers like you.

Another very important element of this crowdsourcing principle concerns social media platforms and devices. When netnography was first developed, there were very few people on the Internet or who had mobile phones, and social media big data analytics and machine learning were almost completely unknown. Over time, though, social media became mobile, corporate, ubiquitous, powerful, algorithmic, surveilled, and varied. As these changes occurred, researchers performing their own investigations of these topics and sites adapted the basic procedures of netnography to better study these new realities.

Just a few short years ago, the currently popular platform TikTok did not exist. Now, it is a rich medium of subcultural connection and potential research insights. Learning about new devices or learning one's way around a social media platform is a bit like learning a new language or culture. It requires time and devotion, as well as some skill and interest. When one researcher

⁴ Please consider these to be very broad recommendations and general guidelines. We strongly recommend reading more extensive and up-to-date information about appropriate research ethics—and how it applies to your national, academic, and institutional context—and also gaining appropriate institutional opinions before conducting your own research project.

develops customized techniques to study that platform or use that device and then writes about it, the entire field benefits from sharing that knowledge. For example, Jeffrey, Ashraf, and Paris (2021) recently contributed to our understanding of Snapchat, tourism, and netnographic methods when they adapt netnography to study Snapchatters' use of the platform.

An interesting thing to contemplate at this concluding point in the chapter is the Zen Koan like question 'When is a netnography not a netnography?'

We can find the answer by first contemplating the many types of ethnography that exist. Ethnographies range from impressionist ethnography and feminist ethnography to auto-ethnography, post-structural and experimental ethnography, and many more besides. What makes these types of ethnography different is that each of them focuses on different types of topics or emphasize different elements of ethnographic method; they perform ethnography differently from the other types. For instance, a feminist ethnography looks at topics of interest to feminist scholars, using appropriate language and particular perspectives to interpret those topics through a feminist scholarship lens. An experimental ethnography plays with representational form and format, often drawing more attention than usual to the privileged interpretive role of the author. But what makes each of these forms of ethnography *ethnographic* is their shared technique, their commitment to participant observation and detailed description, and their cultural research focus.

In its relatively short history, netnography has spawned a few offshoots of its own. For example, "auto-netnography" (one of the earlier adaptations) offers more introspective investigations of life online (Kozinets and Kedzior 2009). Auto-netnographies have been found useful to study social media experiences such as those found in game worlds (Donkin 2017), other immersive virtual environments, or to reflect in-depth on important first-hand social media experiences (Howard 2016).

Emancipatory netnography is another example. Emancipatory netnography emphasizes netnography's liberatory axiology, looking for opportunities to bridge social barriers and raise awareness of urgent social and ecological issues as well as emphasizing the role of the researcher as a social actor and potential social change agent (Kozinets et al. 2021). Another variant of netnography is the "more-than-human netnography" which highlights the complex and dynamic interaction of people, technology, and socio-material practices (Lugosi and Quinton 2018). More-than-human netnographies attempt to more fully account for the role of human and nonhuman actors such as bots, virtual influencers, algorithms, AI, and platforms in the social media experience.

What differentiates these forms of netnography is not so much a change in method or methodology but a weighting of focus. Auto-netnography focuses more on the reflexivity of the researcher, the experience of immersion, and the data captured in the immersion journal. Emancipatory netnography focuses on social change topics and proposing possible social interventions or envisioning positive future paths. More-than-human netnography draws the researchers' attention to the importance of technical characteristics and technological actors that influence people's cultural experiences in social media.

However, each of these types of netnography are forms of research that seeks to understand cultural experiences that happen on social media, or that are reflected through social media. They might each emphasize some different aspect of this cultural experience, but they all draw from the same specific set of related data collection, analysis, ethical, and representational research practices. They all hold a commitment to valuing immersive online experiences and using online traces collected from social media to produce cultural understanding. This core adherence to the same fundamental set of practices is what makes them comparable with one another, compatible with other methods and fields, and ethically observant. That adherence also allows them to deviate and evolve from the basics of the method when required. Saying that their work is a netnography, and following the guidelines for conducting and presenting it, makes clear to readers and reviewers exactly what their research process involved.

In this chapter, we have attempted to convey in introductory fashion some of the insights and core procedures of a rapidly growing qualitative research method. We have done so in the hope that it helps to inspire more rigorous new multidisciplinary research about the extremely important technocultural opportunities and challenges that our civilization—and our academy—currently face. Like humanity itself, netnography will continue to evolve as networks of researchers adapt it to new technocultural realities and chronicle those changing times and spaces. Netnography is a collective enterprise and a call, open to all. Now that you understand it better, we hope you will consider contributing your own unique skills and perspectives to this crowdsourced method and its widening body of knowledge!

Questions

1. What are some of the biggest current challenges for researchers who want to conduct qualitative research on social media?
2. What are some of the reasons both for and against combining artificial intelligence and automated approaches with qualitative research on social media?
3. What are some of the relative strengths and weaknesses of the different ethnographic approaches to studying technologically mediated interactions?
4. What improvements or adjustments of the process of netnography would you make in your own research?

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