METHODOLOGICAL ADVANCES IN RESEARCH ON SOCIAL MOVEMENTS, CONFLICT, AND CHANGE

Edited by Thomas V. Maher and Eric W. Schoon

RESEARCH IN SOCIAL MOVEMENTS, CONFLICTS AND CHANGE

VOLUME 47

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AND CHANGE VOLUME 47

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FOREWORD

During the politicized debates of the 2010s over National Science Foundation (NSF) funding for political science (and to a lesser extent sociology and psychology), many argued against popular branding of the social sciences as "soft" and the natural sciences as "hard." Going further, the Nature Editorial Board (2012) wrote, "Because they deal with systems that are highly complex, adaptive and not rigorously rule-bound, the social sciences are among the most difficult of disciplines, both methodologically and intellectually." Biomedical and physical sciences can be reasonably assured that there are fewer variables involved in mass-produced mice or isotopes and that their subjects' biases, lack of self-awareness, etc. do not influence findings. Conflict and activism add additional layers of difficulty to our work, adding potential intent to subjects' participation and substantial bias in records and governmental funding. As this volume makes clear, nearly all of the potential sources of data within studies of social change, conflict, and movements have a vested and/or political interest in our topics, with which scholars must contend.

I marvel at the inventiveness of RSMCC scholars, who use drones, satellite imagery, recently uncovered archives, the latest computer programs and mathematical models, sheer tenacity, and so much more to get their sources. Technology has rapidly opened possibilities for new research methods since the classic volumes on scholarly practices within social movements by Klandermans and Staggenborg (2002) and della Porta (2014), and those about research in peace and conflict (Druckman, 2005; Höglund & Öberg, 2011; Mazurana et al., 2013). As new methods are developed, though, their potential, ethical application, and limitations must be examined. The process of "how" intellectuals determine what is real or what the data suggest must always be under scrutiny. This entire book offers a great deal of insight into the epistemology of social change, movements, and conflict. It has been my pleasure to support Eric Schoon and Thomas Maher as they produced this important volume.

Lisa Leitz
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NAVIGATING INTERESTS AND CULTIVATING INNOVATION IN THE STUDY OF SOCIAL MOVEMENTS, CONFLICT, AND CHANGE

Thomas V. Maher and Eric W. Schoon

Scholarship on social movements, conflict, and change employs an array of methods and poses multiple methodological challenges. Bearing this in mind, when we wrote the call for papers for this special issue of *Research in Social Movements, Conflict & Change* (RSMCC), we identified a variety of potential topics that might fit the theme and included an open invitation to look beyond the topics we identified. The papers we received reflect the openness of the call, covering an exciting range of topics that engage qualitative and quantitative data, speak to issues related to data collection, coding, and analysis, and employ archival research, interviews, ethnography, and computational methods. We believe that these contributions reflect the breadth and diversity of scholarship in this field.

The research in this volume, however, also consistently speaks to one particular methodological challenge that scholars of social movements, conflict, and change grapple with regardless of our methodological, theoretical, or substantive orientation—namely, the interests represented by our data sources. This thematic coherence was not expected, but, in retrospect, it is also not surprising. The questions of who generated data, how data were generated, the nature of sources' orientation toward the topic at hand, and the interests that sources represent are present to some degree in all research on social movements, conflict, and change. As reflected in the papers in this volume, most data sources on social movements, conflict, or other forms of contentious politics have some stake in, or take on, the issues they are used to explore. Whether our data come from news outlets, activists' social media posts, or individual ethnographers, researchers must account for the positionalities and perspectives embedded in their data as they

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conduct analyses and interpret their findings. To be sure, this is not the only challenge that these papers address. As we summarize below, each contribution tackles important issues that are not necessarily related to the interestedness of our data. However, the interests represented in data on social movements, conflict, and change represents a unifying theme across articles.

Concerns about the interestedness of data sources are not novel, and scholars conducting research related to social movement and conflict have been grappling with them for decades (e.g., Danzger, 1975; Franzosi, 1987; Snyder & Kelly, 1977). In many ways, these concerns are endemic to this field of study. In *Dynamics of Contention*, McAdam, Tarrow, and Tilly broadly situate social movements, wars, revolutions, and other forms of collective action (all subjects central to the RSMCC series) under the rubric of contentious politics. They define contentious politics as

> Episodic, public, collective interactions among makers of claims and their objects when (a) at least one government is a claimant, an object of claims, or a party to the claims and (b) the claims would, if realized, affect the interests of at least one of the claimants. (2001, p. 5)

As this definition suggests, contentious politics involves multiple (at least two) parties in contexts where at least one party's interests will be affected. These characteristics make any efforts to obtain disinterested data challenging, if not impossible. For example, ethnographic research on contentious politics is confronted with the clearly interested and sometimes contradictory perspectives and agendas of the people who populate the field of study (e.g., Kurt, 2017). Archivists face similar challenges, as the construction and maintenance of archives related to contentious politics are shaped by the politics of representation and meaning (see Luft, 2020). Moreover, multiple scholars have shown that news media coverage—a common source of large-N data on contentious politics (Chenoweth & Lewis, 2013; Earl et al., 2004; Jenkins et al., 2012; O'Brien, 2010)—reflects nontrivial biases that range from explicit side-taking to tacit classification via common terminology or feedback loops built into the structure of media coverage itself, which unintentionally privilege certain groups or actors (Earl et al., 2004; Schoon & Beck, 2021; Seguin, 2016). Even when an observer or data source has no vested interest in the outcome of an episode of contention, such episodes routinely reflect fundamental epistemological divides, which are not easily overcome and are often reflected in reporting on incidents. Thus, regardless of whether the interestedness of data is rooted in institutionalized biases or conflicting perspectives, data on contentious politics routinely reflect disparate meanings and conceptions of reality, which in turn shape scholarship in this area.

The issue of interestedness in data on contentious politics has received the most attention among scholars who rely on news media sources. Recognition that news coverage simultaneously provides a critical source of information and is also prone to multiple forms of bias has motivated scholars to offer a variety of methods and suggestions for approaching this issue. However, there are no widely accepted norms, and existing solutions remain contested. For instance, Earl et al. contend that drawing on factual data—i.e., the who, what, where,

and when of news stories—is more reliable than more subjective "why" and "how" questions (2004; although, for disagreements see: Ortiz et al., 2005). Others suggest triangulating across multiple news sources to identify omitted cases (Beyerlein et al., 2018; Davenport, 2010). Yet some caution against this approach considering that it may incorporate multiple forms of bias into models rather than a single known source, and instead suggest incorporating measures of media selectivity into the models themselves either through Heckman or zero-inflated models (Jenkins & Maher, 2016). While this is an active and ongoing debate, the fact that scholars are continuously adding many aforementioned new sources of data suggests that we need to continue to think critically about how these issues affect our results and how we can address them in the course of our research projects.

THIS VOLUME

While concerns about the interestedness of data on contentious politics are not novel, the advances made by the articles in this volume are. In some cases, authors speak to emergent challenges related to data sources that are increasingly widely used but have not been subject to sustained methodological treatment. Data sources such as social media and satellite imagery, along with dramatically expanded access to various historical materials via digitization efforts, have dramatically expanded opportunities for scholars of contentious politics to gain new insights. However, working with these new sources of data poses epistemological and technical challenges that cannot be overlooked. The chapters in this volume speak to these challenges by offering methodological tools for expanding what and who is represented in our data, gaining greater insights through novel approaches to analysis and visualization, and offering frameworks for rendering these data sources substantively and theoretically legible.

Many of the chapters in this issue also highlight the value of transparency and recommend providing open access to data and replication materials. While it may be impossible to obtain neutral data on contentious politics, greater transparency in reporting how data was collected and analyzed is critical for researchers' ability to account for potential biases and effectively interpret their results. Whether this means creating clear and transparent strategies for analysis or leveraging a broader array of open-source data and materials, calls for greater transparency stand to address a core issue in the study of contentious politics and enhance the development of scientific knowledge more broadly.

We have organized the articles in this volume around three key themes. These themes broadly focus on innovations in data collection and processing, epistemology and reflexivity, and novel analytic approaches. While this grouping is intended to provide a loose sense of organization to the presentation of the contributions to this volume, many of the papers speak to more than one theme.

Innovations in Collection and Processing

One solution to the interestedness of our data is to reconsider the scale and nature of the data that we use. By incorporating more or new kinds of data, researchers are better positioned to understand how various data sources are shaping their findings and, consequently, to address limitations or potential sources of bias directly. Four papers engage with these issues directly by exploring innovations in data collection and measurement. Notably, all these papers grapple with methodological challenges and opportunities presented by digital data sources. While two of these papers focus specifically on issues of data collection, the other two focus on issues related to how we process and make sense of newly available data sources. Together, these papers highlight both the incredible potential of access to new data sources and highlight best practices for collecting and analyzing these data.

In their contribution to this volume, King and Nelson offer a novel solution to persistent issues of bias associated with relying on large national newspapers to study social movements. The tendency to rely primarily on national newspapers has long been driven by logistical considerations, but the result is that research typically focuses only on major protest events, which represent only a small part of the work social movements do. Focusing on the United States, King and Nelson show how the widespread availability of digitized news data and advances in computational methods make it possible to overcome common logistical constraints that have driven the long-standing reliance on national news sources. As a result, a much broader array of media outlets—including local and regional sources—can be incorporated into analyses. This article illustrates how expanding the scope of data incorporated into research on social movements allows researchers to better understand and account for the interestedness of traditional data sources, while simultaneously gaining deeper insights into hard-to-measure facets of movements, such as the construction of meaning.

Similarly, exploring the possibilities and pitfalls of increasingly digitized news data, Karatasli shifts focus toward the methodological dimensions of compiling data that are both global and historical. Over the past two decades, scholars have increasingly turned to large-N data sets to conduct broad comparisons that cover multiple decades, and account for the overwhelming majority of countries in the world. Advancing these efforts, Karatasli provides a detailed methodological discussion of data collection procedures for the State-Seeking Nationalist Movements (SSNM) dataset. This impressive dataset compiles news articles covering state-seeking efforts around the world from 1804 to 2013. While acknowledging the limitations of using global news sources, Karatasli highlights the benefits of using media coverage—rather than encyclopedias or historiography—to construct a global comparative dataset. He argues, in essence, that such retrospective sources are often shaped by outcomes, whereas contemporaneous media coverage captures observations and sentiments before historical outcomes are known. He further details the value of manual coding, arguing that it both provides a necessary foundation for training computer algorithms and allows researchers to gain deeper insights into their topics of analysis.

Greenland and Fabiani turn attention to the use of satellite imagery in research on contentious politics. Satellite imagery has become central to efforts to understand the dynamics of armed conflict. As Fabiani and Greenland write, "Satellite images inform policies and determine aid to refugees and survivors of massacres. They direct lawmakers' and journalists' attention, crystallizing complex socio-political events in start terms with their powerful tools of ocular capture" (p. 70). Yet, despite their importance, Greenland and Fabiani explain how the satellite images we often see in Google maps or via other sources are actually complex constructions of multiple data points that are not amenable to straightforward interpretation. The authors discuss critical issues of provenance (where images come from) and data quality that affect the utility and interpretation of satellite imagery and interrogate the ethics of using satellite imagery. Based on interviews with researchers who rely on satellite imagery, the authors show marked inconsistencies in how this powerful source of data is understood and interpreted. Building on these insights, they introduce a systematic coding methodology for satellite imagery.

For their part, Rochford, Hudgens, and Einwohner explore the conceptual and methodological challenges introduced by the growing prevalence of social media data in research on social movements, conflict, and change. As social movement efforts and activities are increasingly documented (and even carried out) on social media, the collection and analysis of social media data has exploded over the past decade. However, as Rochford, Hudgens, and Einwohner write, "The social media landscape is constantly shifting... The fast-paced life cycle of apps like TikTok and Twitter, coupled with the fact that users' accounts do not necessarily represent unique individuals, present new methodological challenges for researchers" (p. 92). To address these challenges, the authors propose treating social media data as a form of "instant archive—a self-curated, co-constituted archive that populates quickly and turns over rapidly..." (p. 92). In addition to highlighting ethical considerations associated with the use of social media data, the authors draw on recent scholarship on archival epistemology to highlight key features of this "instant archive" that researchers must be explicitly accounted for and used to guide analyses of this critical and evolving data source.

Epistemology and Reflexivity

While the emergence and expansion of digital data sources has had a tremendous influence on research on social movements, conflict, and change, qualitative methods—including archival research, interviews, and ethnography—remain a mainstay of innovative research in this area. Another set of papers offers important insights and considerations for scholars employing these methods in the study of social movements specifically, and contentious politics more broadly. These papers explore epistemological and ethical considerations, offering guidance on incorporating reflexivity into both the collection and analysis of qualitative data. In doing so, they speak to key issues of researcher interestedness.

In her chapter, Reger draws on her work with the Women's Music Archives and her training with feminist ethnographic methods to consider the challenges of studying social movement archives. Here, she argues that researchers doing archival work need to consider several archive-specific questions in addition to their research concerns. First, researchers need to consider how the archives were created and the interests of their creators. As she details, many archives are a labor of love, and the originator's intent needs to be considered as the archivists proceed with their work. Second, Reger encourages us to consider who has the right to tell the community story as "[a]rchives and the responses to those who read our work can tell us about the identities and boundaries of a marginalized community" (p. 136). This may be particularly important for identifying "silences"—i.e., unstated or unwritten feelings or perspectives—in the archives, and Reger deftly uses the silences around an activist's gender identity to convey the challenges inherent in this process. Finally, Reger raises the question of whether there are "voices" in the archive. Are archives sufficient for studying movement communities, and is it possible to grasp the full context of the moment from the materials found in an archive? Reger believes we can. The archives she studies were "full of arguments, complaints, dissension, as well as accolades, plans, dreams, and strategies," (p. 133) and we can access these by paying attention to emotional twinges, phrases, and interactions.

In her contribution, Heideman explores the ethics of working with students to collect protest data. She argues that our focus when discussing ethics is, understandably, on how we treat the people and communities we are collecting data from, but we must also consider how we treat the students—namely graduate students—who volunteer to attend protests and collect data. Overlooking how we treat graduate students can leave them doing work without clear financial or professional benefits, especially when scholars are responding to sudden events. Second, project leaders can also overlook how students' race, gender identity, or the characteristics of the protest event may create additional risks. This is particularly true for students collecting data at Black Lives Matter or anti-police brutality events. Heideman proposes using the Belmont principles to create guidelines for the ethical treatment of student researchers, which are organized around respect for persons, beneficence, and justice. Heideman argues that "we cannot leave the protection of the students up to individual faculty members they work with," (p. 156) and outlines how individual researchers, professional organizations, sections of professional organizations, journals and academic presses, and the profession more broadly can all contribute to creating a professional community that is more mindful of how we ethically treat the students who work with us in addition to those who we are collecting data on.

For their part, Ragon and Reyes focus on insider-outsider dynamics in the ethnographic study of social movements. In this innovative and accessible article, the authors take it in turn to discuss their own experiences of balancing simultaneous insider and outsider status in the sites where they conducted research. Focusing specifically on challenges faced by qualitative researchers studying identity-based movements embedded in institutions, each author shares how they maintained mindfulness while negotiating the impact of their own identity

relative to their research subjects, determined the appropriate level of participation in their field sites, and gained access to their field sites. Building from their common experiences in contexts that are in many ways divergent, Ragon and Reyes elaborate key questions that researchers relying on participant observation to study social movements must consider and address as they collect data.

Novel Analytics

In addition to making strides in how we collect, archive, and think about data on social movements, conflict, and change, scholars have also been considering new and inventive approaches to analyzing existing data. Our third set of papers explores innovative analytic tools for our methodological toolkits. These papers offer new techniques for visualizing qualitative comparative analysis (QCA) results, methods for measuring diffusion, and approaches to coding social media data. In the process, they encourage us to not only think critically about the data we have but what we can do with it as well.

In their paper, Amenta, Caren, and Yuan analyze coverage of 29 social movements across 100 years from four national newspapers to determine when social movements receive extensive attention from mainstream media outlets. The authors use QCA, an approach that assesses the combinatorial relationship between specified conditions and an outcome, as well as an innovative methodological approach where they use visualization to illustrate the combinatorial nature of the protest and institutional conditions. The area and overlap conveyed by their diagrams help show which combinations of protest and institutional conditions are most associated with media coverage. Drawing on these models and an institutional mediation approach, the authors show how media coverage is the result of movement efforts (e.g., protest size and disruptiveness) as well as the institutions they target (specifically, partisan-dominant contexts). As they note, their work builds on prior methodological arguments by highlighting how "having a wide range of movements and time periods . . . helps to identify different pathways to movement influence that might be missed by focusing on one movement, similar movements, or delimited periods, as is the case in most research on social movements" (p. 187).

Zhang and Cai develop a new inter-event approach to study what types of protest events tend to diffuse or decline. Their approach addresses the ad hoc nature of prior studies of protest diffusion while being mindful of how the diffusion of protest events differs from other, more cumulative, forms of diffusion. Drawing on epidemiological approaches, Zhang and Cai develop a measure of "event diffusion momentum" that is constructed by analyzing the ratio of events before and after a specified time to one another. Using the metric constructed with dynamics of collective action data, they find that mid-size protests, organized protests, and, surprisingly, violence all provoke subsequent protests when compared with small, unorganized, or peaceful protests. Reinforcing their commitment to transparency and open research, these authors also provide the code package for others interested in using the same models for their studies.

Finally, Yuan draws on data from Telegram—a globally accessible instant messaging service that provides optional end-to-end encryption—to analyze how different styles of repression influence how activists organize online. Focusing on the mobilization in response to the 2019 Anti-Extradition Law Amendment Bill protests in Hong Kong, Yuan combines unique messaging data collected using syntactic rule-based methods with network methods to analyze how selective and indiscriminate repression influenced the structure of online activist networks. She finds that, while indiscriminate repression dissolved broad online coalitions, repression targeting select groups and individuals tightened support for targeted groups as activists were incentivized to collaborate. She concludes by highlighting the varying ways that threat may operate, and how syntactic coding can be useful for focused case studies where the researcher knows the case and the major actors.

CONCLUSION

Taken together, the articles in this volume represent the breadth of methodological approaches in the study of social movements, conflict, and change, offering innovative advances that speak to a range of challenges and opportunities. The interestedness of data on contentious politics is a basis for thematic unity across the volume. However, it is important to emphasize that the advances offered by the articles are not limited to this particular challenge. Moving forward, the works in this volume stand to challenge researchers engaged in the study of social movements, conflict, and change to critically interrogate their data sources, while offering offer innovative tools for researchers as they do.

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