

Conducting cross-cultural qualitative interviews with mainland Chinese participants during COVID: Lessons from the field

Qualitative Research
2022, Vol. 22(1) 154–165
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DOI: 10.1177/1468794120974157
journals.sagepub.com/home/qrj



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Abstract

The COVID-19 global pandemic has had a significant impact on researchers as the normal and expected difficulties of research are exacerbated as education and our way of life has drastically changed. This research note is a reflective narrative of the author's experience transitioning from face-to-face to online interviews in light of social distancing and global travel restrictions. Through a descriptive analysis, this article details the numerous ethical, logistical, practical, and cultural issues the author confronted in preparation for qualitative cross-cultural online interview research through personal reflections, current events, and existing literature. The aim of this article is to highlight personal experience to better inform future research and encourage flexibility and reflexivity in research. It is hoped that this article can be of use to further develop cross-cultural qualitative methodology and expand upon the emerging field of literature surrounding videoconferencing qualitative research.

Keywords

qualitative research, cross-cultural research, online interviews, China, COVID-19, videoconferencing, WeChat, guanxi

The problem is not that we tailor but that so few qualitative researchers reveal that we do this work, much less how we do this work. (Fine, 1994 retrieved from Pillow, 2010)

Introduction

Arksey and Knight (1999) issued a stark warning for researchers: 'do not assume that your study will proceed as you imagined.' I became aptly aware of this warning halfway

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through ethnographic research in Mainland China when I was forced to leave the country as the coronavirus disease (COVID-19) global pandemic grew. While I was safe, my research was jeopardized.

My original research design relied heavily upon face-to-face interviews in Mainland China, but global travel restrictions, social distancing guidelines, and public health guidance made face-to-face discussions impossible. As interviewing is a basic mode of inquiry in qualitative research (Seidman, 2006: 7), collecting diverse opinions, perspectives, and language through in-depth interviews was integral to my phenomenological study. Therefore, I had to rethink my project design and envision how I could conduct interviews in a safe, appropriate, and feasible manner while crossing geographic, digital, and cultural borders.

Traditional social science research dictates that face-to-face interviews are the ideal qualitative interview methodology, while other modes can be described as ‘second best’ (Holt, 2010); such mentality assumes all researchers can function within similar time frames, budgets, and access points, which in reality is rarely the case. Luckily, technological advances, including online videoconferencing platforms, have provided new, useful avenues for qualitative research (Deakin and Wakefield, 2014; James and Busher, 2006; Lo Iacono et al., 2016; O’Connor et al., 2008). Lobe et al. (2020) note while online research contains special ethical considerations, it remains a valuable tool in the face of social distancing protocols.

However, conducting interviews with participants in Mainland China presented three significant cultural-specific difficulties. First, many Western online platforms are banned in China through the Chinese government’s online censorship, limiting available interview platforms. Second, the ubiquitous online monitoring on Chinese media platforms places restrictions on the type of speech that can be conveyed through these platforms, which must avoid controversial or politically sensitive topics. As participant and researcher safety was the utmost priority, questions had to be designed in a thoughtful way to achieve data collection while maintaining integrity in the eyes of Chinese law. Third, online interviews raised questions of practical issues such as time zones, technological difficulties, and digital competencies that would not have been considered during face-to-face interviews.

The preparation for a qualitative interview is arguably as important, if not more important than the interview itself. Interviews are not simply a matter of asking the right questions, but rather illustrate a negotiation of information between two parties, with the interviewer steering the ‘car,’ but with the interviewee determining the vehicle, its final direction, and speed at which it travels. My concerns conducting online qualitative interviews focused on three key areas: safety, ethics, and reflexivity; logistics and practical issues; and participant contact, rapport, and researcher credibility. As the research plan developed, it became clear that each area was intrinsically connected; choosing one mode of interviewing for its practicality would raise ethical or safety questions; asking certain questions could only be feasible through specific modes of interviewing; and some participants could only be interviewed via certain modes. Therefore, each decision required extensive research, reflexivity, and deliberation.

Safety, ethics, and reflexivity

The first and most important concern in conducting online interviews was the safety of participants and researchers. While I did not deem my research topic controversial or sensitive in any way, I nevertheless adhered to a strict line of reflexive questioning to ensure I could safely, ethically, and confidently conduct online qualitative interviews. I asked the following questions:

- Are interviews crucial to my research?
- Am I the best person to carry out the interviews?
- Am I in the best position to describe what is 'safe' or 'unsafe' for another person (i.e., the participant)?
- What are the potential consequences of conducting this interview? Do they merit the interview?
- Is the data worth it? Will it cause more harm than good?
- Who will benefit from the interview? How will the interviewee benefit?

These questions engaged with both prospective and retrospective reflexivity, considering the ways in which the researcher *affects* and *is affected* by the research (Attia and Edge, 2017; Cole and Masney, 2012), and were the first steps in ensuring research validity and reliability (Berger, 2015; James and Busher, 2006). As Morse et al. (2002) aptly wrote, 'research is only as good as the investigator,' so I focused on critical reflection and 'uncomfortable reflexivity' (Pillow, 2010) to confront my own bias, subjectivity, and the foundations by which I legitimize and validate my research and role.

Charmaz (2014) discusses the necessity to understand the perspectives of participants while acknowledging that the interviewer can never separate themselves entirely from the interview process. I tried to visualize what the interview would be *like* for participants, and if I could ensure a sense of openness, rapport, and confidentiality. As I was conducting research from the 'outsider' perspective (Attia and Edge, 2017), I was aware that my unique background and opinions, including lack of personal experience with the phenomena I study, would shape the research, analysis, and findings of the study (Berger, 2015; Smith, 1999).

While many fundamental ethical issues remain the same in online and face-to-face contexts (Lobe et al., 2020), conducting online interviews in China presented case-specific ethical considerations. In addition to university (Cambridge, 2020), British Educational Research Association (BERA, 2018), and online-specific ethical guidance (Franzke et al., 2020), Chinese ethical concerns needed to be addressed. As researchers should consider cross-cultural issues, risks, and benefits for the participant and researcher when conducting online research (Ess and Hård af Segerstad, 2019), my interview had to be designed to facilitate respectful and legal conversations on accessible platforms.

The Chinese digital world differs greatly from Western concepts, particularly in terms of access, law, and censorship. As China has a long history of institutionalized censorship, which has been extended and rigorously implemented within the digital realms (Guo and Feng, 2012), I acknowledged that simply accessing the internet could raise ethical issues for participants. Online speech or actions contrary to established doctrine

can translate into severe consequences for its citizens in China and abroad, particularly through recent laws such as the recent Hong Kong National Security Law (Lam, 2020).

In addition, conducting online interviews within China or within the Chinese online sphere necessitates the researcher and interviewee to give up aspects of their anonymity. Although Internet platforms allow degrees of anonymity (Meng et al., 2017), citizens in China are required by law to register their real name and personal identification information to access the Internet and Internet services (Lee and Liu, 2016), removing anonymity and creating accountability to citizens' online speech and actions. The open nature of online and digital media creates difficulties for the researcher to ensure participants' anonymity (James and Busher, 2006), so I acknowledged there may potentially be recordings, transcripts, or other collections of data from this interview outside of my own authorized recordings.

Logistical and practical issues

O'Connor et al. (2008) argue that online interview methods can mitigate the distance of physical space, providing access to otherwise inaccessible or difficult to access participants. In addition, online interviews may facilitate deeper, more reflective responses from participants and can mediate sensitive or embarrassing conversations with the researcher (Deakin and Wakefield, 2014; Madge and O'Connor, 2002). However, downsides include difficult cross-cultural logistics. In addition, prior research has suggested that establishing rapport with participants online may be more challenging to establish or differ from face-to-face experiences (Archibald et al., 2019; Deakin and Wakefield, 2014; James and Busher, 2006; Seitz, 2016; Weller, 2017).

In deciding which interview mode was most appropriate, I analyzed email, telephone, and videoconferencing. While previous literature has suggested that the mode of interviewing does not influence participant answers (Sturges and Hanrahan, 2004), careful consideration was given to which replacement method would be most appropriate in the Chinese context and facilitate similar quality of data for my preferred methodology of semistructured interviews.

While email is a useful and practical tool for qualitative researchers (Fritz and Vandermause, 2018), it is not widely used in China and therefore was excluded. Telephone interviews have been useful dealing with sensitive research (Sturges and Hanrahan, 2004) and can mitigate researcher bias as they physically cannot see the participant's age, gender, or background (O'Connor et al., 2008). While Holt (2010) notes telephone interviews can produce rich descriptions due to lack of nonverbal communication (Holt, 2010), Arksey and Knight (1999) cautioned that telephone interviews have the propensity to generate short answers. Therefore, it remained unclear if telephone interviews could facilitate my desired reflective, iterative discussions with participants.

My preference was online videoconferencing, which I felt would be the closest substitute to face-to-face interviews and allow synchronous conversations with participants. Although advances of Internet-mediated research, such as the use of VoIP (Voice over Internet Protocol) platforms, have created new avenues for qualitative interview research, they remain underdeveloped in terms of academic literature and discussion (Deakin and Wakefield, 2014; Lo Iacono et al., 2016). Despite the advantages of using VoIP as a

research tool, numerous ethical and practical issues have arisen in recent years as the services continue to develop (Deakin and Wakefield, 2014; Seitz, 2016; Weller, 2017).

As Chinese laws had to be followed, platforms banned in China, such as WhatsApp, Facebook Messenger, Google Hangouts, or Microsoft Teams, could not be used. Of the remaining options, Skype, Zoom, and WeChat were deemed to be the best options in terms of convenience, cost, and ease of use. I attempted to choose which platform was most appropriate by analyzing the conceptual and technical risks associated with using each platform, including how information or data is stored, the potential for anonymity, and practical issues.

Skype (Skype Technologies, USA) is a popular videoconferencing platform with video recording tools that can aid transcultural qualitative research (Lo Iacono et al., 2016). Although Skype is used in China, personal experience informed the conclusion that it is less popular than Chinese platforms and may provide difficulties for participant use. Seitz (2016) found Skype negatively impacted participants' willingness to engage in in-depth responses to sensitive questions, which may be more related to Skype's video element than the platform itself. However, Sipes et al. (2019) concluded voice-only Skype was an effective method for detailed qualitative research when discussing sensitive topics. While Skype remained an effective option, its lack of familiarity in China could provide difficulties.

Zoom (Zoom Video Communications) is another global videoconferencing platform that has seen a sharp increase in popularity due to the pandemic (Sherman, 2020). Zoom is an easy-to-use, intuitive platform with recording capabilities, similar to Skype, with free calls up to 40 minutes. Deakin and Wakefield (2014) found Zoom to be a viable research tool due to ease of use, cost-effectiveness, data management, and security features. However, Zoom's growth during the pandemic has renewed focus on the platform and raised numerous security concerns with particular reference to China. For example, Zoom faced political scrutiny from the West due to the company's management in China (Sherman, 2020), and in a high-profile case removed accounts from activists at the bidding of the Chinese Communist Party (CCP) (Davidson and Kuo, 2020). Although Zoom is an efficient research tool in Western contexts with widespread popularity during the pandemic, its use may pose ethical and security concerns.

WeChat (Tencent Holdings Ltd.) is the most popular social media app within China. With over 1.5 billion registered users, it includes numerous utilities outside of chat messaging, including calls, video, photo, music, shopping, banking, and more (Tencent, 2019). WeChat is ubiquitous in Chinese daily life and can be a useful tool for remote research due to its widespread familiarity (Sie et al., 2016). However, WeChat's domestic Chinese and international accounts are highly monitored, censoring content on a dynamic basis (Knockel et al., 2020). In addition, personal experience using WeChat while located geographically outside of China proved the platform to be less than optimal, with difficulties connecting and calls often dropping. While Seitz (2016) proposed technical difficulties on online qualitative research may damage rapport and create a loss of intimacy, Lo Iacono et al. (2016) argue that rapport depends more on the interviewer–interviewee relationship and topic of study. The obvious benefit of using WeChat was the ease of use and familiarity for participants, but the platform's monitoring and censorship, as well as potential connectivity issues, made it a less than optimal choice for the researcher.

O'Connor et al. (2008) emphasize participant technological competence impacts researcher's access to them (Seitz, 2016). As all participants were contacted through WeChat, it was assumed that participants were highly competent on the platform, and therefore using WeChat would facilitate greater access to participants. To ensure participant preference, I allowed participants to select which videoconferencing platforms (WeChat, Skype, or Zoom) they would feel comfortable using on the consent form and used the participant's preferred mode.

While videoconferencing was the optimal choice for my research, the use of video during videoconferencing interviews was further assessed to ensure participant comfort, anonymity, and ethical integrity (Lo Iacono et al., 2016; Seitz, 2016; Sipes et al., 2019). Hanna (2012) notes that participants may be more comfortable with interviews conducted online and through VoIP services as they can remain in their preferred safe environment. On the other hand, Seitz (2016) noted that participants may fear their conversation could be overheard by others, violating their privacy. Throughout the interview process, from contacting participants to the interview itself, I remained cognizant of performative speech, actions, and contextual elements, which would enhance the rich, descriptive data elicited from the interview, as well as ensure the interviewee was comfortable, safe, and respected. While I preferred to use video to gauge background settings and nonverbal clues, the final decision remained at the discretion of the participants the day of the interview.

Once the mode of interviewing was established, identifying the most appropriate methodology remained. I utilized grounded theory (GT) to conduct semistructured interviews, allowing for an iterative process of data collection, coding, and analysis (Shingler et al., 2018). The interview mode, methodology, and data were interdependent and continually reconceptualized, which aided in verification, reliability, and rigor (Morse et al., 2002).

I began each interview with a restatement of my name, background, and research as well as the reason for requesting the interview. I then gave clear instructions as to how the interview would proceed, including the type of questions, semistructured format, and approximation of time. Lastly, I asked the participants to reaffirm verbal consent that I was recording the interview and the data will be transcribed.

Questions were developed to be open-ended and reflected data collected during the in-country research period, including observations, policy and documents, and informal discussions. Initial questions were followed by 'probes' to gain deeper understanding (James and Busher, 2006). I followed the method of 'listen more, talk less' (Seidman, 2006) and allowed the conversation direction to be at the discretion of the interviewee. I remained engaged throughout the interview, nodding and making encouraging remarks to reassure the participant that their voice was being heard and understood (Seitz, 2016). Particular focus was placed on the language of the questions to maintain a positive, inquisitive, and friendly interview atmosphere, but also to maintain language sensitivity and ensure questions were relevant to participant experiences (Berger, 2015). My speech mirrored the language and social clues of the interviewer (Fritz and Vandermause, 2018), and I attempted to use informal language whenever possible.

In addition to systemic censorship, I also acknowledged the potential for self-censorship among participants, which may hinder data validity and reliability. China's

robust censorship and propaganda schemes place limits on Chinese citizens' speech, suggesting citizens express a circumscribed and predetermined set of preferences (Meng et al., 2017). King et al. (2013) found that while the Chinese government allows some criticism, collective action, whether real or suggested, is heavily censored. Shen and Truex (2020) found high rates of self-censorship within China, suggesting citizens may hide their opinions to adhere to social norms and requirements (Meng et al., 2017).

Contemporary China can be understood as a 'closed authoritarian system' (Shen and Truex, 2020), leading to increased occurrence of preference falsification (Jiang and Yang, 2016). The omnipresence of preference falsification in authoritarian regimes has the potential to distort public knowledge (ibid.; Kuran, 1997). This phenomenon makes conducting research in these contexts difficult, as participants may maintain different private and public opinions to conform to social norms and requirements through the concept of social desirability bias (Arnold and Feldman, 1981; Shen and Truex, 2020). Jiang and Yang (2016: 9) found self-censorship was highest among marginalized citizens, notably women and non-Party members, among others. These insights were useful during the interview to better understand participant hesitation, uncertainty, or unwillingness to answer.

As the researcher, I felt an ethical responsibility to end conversations that veered into controversial topics, regardless of the importance of this data to my research. Prior to the interviews, I reflected on 'red line' topics that I felt would encroach upon political or controversial dialogue and ensured that my questions were designed to steer clear of these topics for the safety of the researcher and interviewee.

Participant contact, rapport, and researcher credibility

Building and maintaining trust with participants is not only essential to qualitative research (Lincoln et al., 1985) but also to generate the rich, descriptive data I hoped for, which in turn validates the research (Attia and Edge, 2017; Creswell and Miller, 2000). Therefore, I spent significant thought and effort communicating with participants to establish trust, rapport, and credibility while ensuring ethical legitimacy. I relied on relationships formed during my in-country ethnographic experience as well as snowballing to solicit participants.

When conducting research in China or within the Chinese diaspora, the most important quality to achieve is *guanxi* (relationships). *Guanxi* is a term stemming from Confucian ideology that describes the 'relation-centered and collaborative culture that seeks relationship harmony' (Qian et al., 2019: 2) and is essential for human, political, and business relationships in China (Qi, 2013). *Guanxi* is highly prominent in WeChat, used to build dynamic relationships with people outside of their family in the technological age (Chen et al., 2017). Different types of *guanxi* exist, illustrating its personal/familial and impersonal/contractual applications in society (Chen et al., 2013).

Guanxi can be understood through the Western idea of 'gatekeepers' who allow access to participants. Both formal and informal gatekeepers (Seidman, 2006) are accessed by researchers through established relationships, either by the researcher establishing themselves as credible and legitimate, or through existing interpersonal relationships. Within

the Chinese context, *guanxi* both relies on existing relationships and establishes new connections through an interactive and cyclical process of mutual benefit. For example, my in-country research relied upon the *guanxi* of my host institution supervisor to introduce me to research sites, which I then expanded upon and forged new relationships. *Guanxi* was also established through my cultural knowledge, language skills, and educational credibility, reiterating the necessity of researcher cultural competency when conducting cross-cultural qualitative research.

In addition to messaging on WeChat, each participant was sent an information sheet before they agreed to the interview to maintain transparency and provide clear information on the interviewee requirements in line with ethical guidance. As providing photographs to interviewees can facilitate the development of rapport (Deakin and Wakefield, 2014; Madge and O'Connor, 2002), the information sheet included a photo, clearly identifying myself as non-Chinese. This was an important step in transparency to illustrate that despite proficient language skills, I was an 'outsider' and needed to build trust over the course of the research (Attia and Edge, 2017).

Qualitative inquiry attempts to reduce power dynamics, diverging from traditional methodology where the researcher wields power over the 'researched' (Karnieli-Miller et al., 2009), and it remained an important task to establish and support participant power and control throughout the research process (James and Busher, 2006). I aimed to negotiate my status as an 'outsider' while acknowledging the ethical and methodological issues that stem from the inherent power imbalance in the researcher–researched relationship (Råheim et al., 2016).

I attempted to position myself, the interview, and my research in a nonthreatening and respectful manner by reiterating my status as a student to show deference and a sincere desire to learn. In addition, consent forms contained information of my supervisor, giving interviewees leverage and an 'insider' representative of my research. I also introduced my research in a collaborative way to clarify my research and strengthen *guanxi* through mutual benefit.

Discussion

Based on my experience, using VoIP technologies, such as WeChat, for cross-cultural interviews is an effective method for qualitative research, but only after thorough consideration is given to ethical, security, and logistical concerns. Regardless of the research topic and mode, researchers should undergo a thorough and reflexive risk assessment to ensure ethical integrity can be maintained when conducting online qualitative interviews. If there are any doubts regarding the safety of the researcher or participant, another mode of qualitative inquiry should be adopted without hesitation.

Although my research design changed significantly due to the pandemic, I feel my study and skills as an academic have benefited as this changed forced me to constantly reconceptualize, verify, and make pragmatic adjustments, which contributed to the overall phenomenological methodology and analysis. This project also reaffirmed the importance of cross-cultural researchers to have a broad range of cultural knowledge, as social, political, and cultural circumstances can have significant impacts on the mode, method, and scope of cross-cultural qualitative research. Lastly, my experience made me realize

the collaborative nature of qualitative research, in that successful projects are the result of collaboration, generosity, and help from participants, peers, and supervisors throughout the world.

Conclusion

This paper contributes a real-life and timely example of transitioning to cross-cultural online qualitative research during a global pandemic. Throughout this process, I learned valuable lessons such as the importance of reflexivity, *guanxi*, and increased awareness of cultural, political, and social norms in cross-cultural qualitative research. My experience reaffirms the importance of both significant preparation for interviews as well as anticipating the need for flexibility and project reconceptualization without sacrificing research integrity.

While there is a broad scope of literature on qualitative interview methodology, many researchers find themselves navigating through a myriad of cultural, personal, and time-sensitive issues that require specific judgment calls, as no two researchers or projects are identical. Cross-cultural qualitative research will continue to develop in conjunction with technological advancement and globalization trends. It is my hope that this research will contribute to the underdeveloped area of online videoconferencing qualitative research (Lo Iacono et al., 2016), as well as the emerging field of utilizing WeChat for cross-cultural qualitative research (Montag et al., 2018; Sie et al., 2016).

Declaration of Conflicting Interests

The author declared no potential conflicts of interest with respect to the research, authorship, and/or publication of this article.

Funding

The author disclosed receipt of the following financial support for the research, authorship, and/or publication of this article: This work was supported by the U.S. Student Fulbright Scholarship.

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