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Bounegru, L.; Devries, M.; Weltevrede, E.

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The Research Persona Method: Figuring and Reconfiguring Personalised Information Flows

Liliana Bounegru, Melody Devries,
and Esther Weltevrede

We live in a time of intense political polarisation worldwide, fuelled by manipulated and manipulating personalised information flows. How are these troubling kinds of personalisation accomplished? How can the dynamics of personalisation—from algorithmic recommendations to targeted advertising—be studied up close, as users might experience them? What might personalisation tell us about how troubling content travels? This chapter examines the prospects of assembling research personas as a way to obtain “critical proximity” (Latour 2005; Birkbak et al. 2015) on

L. Bounegru

Department of Digital Humanities, King’s College London, London, UK
e-mail: liliana.bounegru@kcl.ac.uk

M. Devries

Communication and Culture Department, Toronto Metropolitan University,
Toronto, ON, Canada

E. Weltevrede (✉)

Department of Media Studies, University of Amsterdam, Amsterdam,
Netherlands
e-mail: e.j.t.weltevrede@uva.nl

how personalisation is produced, encountered and experienced online, drawing on previous and ongoing digital methods projects on misinformation, disinformation and authenticity. In complement to research approaches that undertake larger-scale studies of personalisation at a distance through statistical and computational techniques, we examine how persona methods may enable researchers to explore, study and *figure*¹ personalisation up close through interplays and dynamics of algorithms and user features. Drawing from research that proposes that we look not only *inside* but also *across* algorithms (Ananny & Crawford 2016; see also Seaver 2017), and from digital methods approaches to repurposing “methods of the medium” (Rogers 2013), we discuss how configuring research personas can be used to study how personalisation is produced and accomplished through various actors, devices, interfaces, infrastructures, methods, techniques, user practices and data flows.

Challenges to Understanding Personalised Information Flows

Researchers have built reliable tools and curated large amounts of data to track the spread of harmful information online.² We can now map the spread of fake news and identify institutions, groups, individuals and bots that actively participate in mis- and disinformation on social media (Lim 2019). However, these more distant “big data” approaches tell us less about how users experience the highly personalised spaces and practices of current media environments, wherein problematic information forms and spreads. Personalised information flows aim to provoke systematised affective resonances between lived experiences, discourses, ideologies and networked logics. These resonances do not require truthfulness to work and thus render fact-checking less effective as an intervention (Devries and Brett 2021). Indeed, anyone’s passionate adherence to the demonstrably false is not simply a matter of getting the wrong kind of

¹ See this volume’s Introduction.

² See, for instance, <https://digitalmethods.net/>, <https://publicdatalab.org/>, <https://digitaldemocracies.org/>.

information. Instead, this devotion points to a coming together of antagonistic, highly charged responses and expressions that reflect deep societal divisions. Personalised information flows channel complex processes of identity and group formation in search for connections with “like-minded people”. This widespread search for familiarity constitutes the infrastructural principle of social media platforms. Indeed, Wendy Chun (in Apprigh et al. 2018) has highlighted the homophilic (from homophily: love of the same) dynamics that sustain any social media and associated recommendation algorithms that group users according to similarity along some dimension, assuming their desire for such, and exacerbate differences between groups. These dynamics are said to facilitate the emergence of “filter bubbles” (Pariser 2012), where users habitually interact primarily with users and content that share their values, likes, and preferences.³

However, the paths that lead to embracing mis- and disinformation via personalised information flows are not straightforward. For instance, a young, white, unemployed man engaged with white nationalist groups radically differs from a middle-class conservative woman focused on raising her children. Yet, these two individuals can end up in the same online spaces claiming that Covid-19 is a conspiracy. The shaping of personalised information flows, in other words, depends on the particular and personal lived experiences of online users, yet is homogenising nonetheless.

Our schema of the complex and contradictory processes present in personalised information flows acknowledges three interlinked elements. The first is the *algorithmic infrastructure* of personalisation on social media platforms, specifically the algorithmic curation of content for individual users based on a programmed, homophilic model that organises communities based on an assumed desire to see like-minded content. The second is the shaping of manipulation, such as mis- and disinformation discourses, by corporate and institutional actors using *data flows* to affect user interactions. Cambridge Analytica famously explained how they grouped users according to psychographics and socio-economic data (Venturini and Rogers 2019). This allowed them to target each group

³This notion has been empirically interrogated and challenged by media researchers (e.g. Bruns 2019).

with specific discourses concerning issues like national values and identity. The third is the triggering of *cognitive and affective responses* that tap into lived experiences. Daily streams of targeted content cultivate affective responses (such as joy, fear, paranoia and rage) over time. In turn, these triggers concretise users' identification with the narratives and realities depicted by this content (Devries 2022).

There are several challenges to undertaking a multi-layered analysis of these elements, which led us to formulate the research persona method. First, it requires reconciling two radically different analytical approaches: the "view from above" via broad structural dynamics and the tracking of information flows, and the "view from within", that is, the affective, personal experience of users. Second is the problem of obtaining data in the first place: most social media platforms are for-profit enterprises whose revenues are based on keeping and selling user data, and information about how such data is mobilised, unavailable for critical investigations.

Researchers have had to rely on reverse engineering methods, creating and repurposing data tracking tools just to glimpse automated personalisation processes. Another avenue for research into personalised information flows is through qualitative ethnographic methods such as participant observation (Hine 2008) and obtaining stream captures from real-life participants via internet panels or voluntary donations (Nechushtai and Lewis 2019; Bechmann and Nielbo 2018; Puschmann 2018). Yet, these more embedded approaches are not without issues. While they enable researchers to investigate the type of content recommended to users, they are less suited for capturing the interplay between user practices and algorithmic recommendations. And importantly, it is this interplay that provides curated content that in turn provokes actions that may shape, solidify and spark political views over time, as demonstrated in the storming of the US Capitol in January 2021, following months of intense mediated and networked propaganda centred on election fraud conspiracies.

In the context of studying personalised information flows, digital ethnographic approaches (as discussed, e.g. by Boellstorff et al. 2012) are particularly challenging not only because users inhabit multiple online cultural spaces at once, but also because it is difficult to gain trust and consent from users already distrustful of academic research (Phillips

2015). Online environments inundated by conservative or far-right talking points have historically attacked the academy and in particular have marked the social sciences as untrustworthy. This considered, research into manipulative information can be high risk for researchers. Relatedly, it can be challenging to gain the support of Research Ethics Boards for this type of research while ensuring researcher protection. The research persona answers some of these concerns in a novel way: what if, instead of looking at others as the subjects of misinformation, researchers were to take themselves as the subjects of misinformation? Rather than examining “what do they see?” through interviews or ethnographies, one can explore “what would I see?” by exploring the interplay between user practices and algorithmic recommendations to assemble a relational perspective on the dynamics of personalisation.

Situating the Persona as a Research Device

The research persona offers a way for researchers to overcome these challenges and make visible and researchable the key moments of interplay between the three elements described above: *algorithmic infrastructure*, *data flows*, and *cognitive and affective responses*. We examine how personas may be configured in digital methods research, including examples incorporating interface analysis, customised software and speculative methods. The practice of the method produces research materials that, for the reasons discussed in the previous section, would otherwise not be available for critical inquiry. At the same time, the research persona method emerges from and challenges persona-based approaches in other fields, as we discuss below.

The term “persona” has various definitions and roots in diverse fields, including theatre, literature, anthropology, sociology, cultural and media studies, design, software development and marketing. Perhaps its earliest use is as “*dramatis personae*” and refers to the tradition of theatre actors wearing masks to signify character types or personas, a practice that continues today. Giles (2020) identifies a key tension in this use of persona, in that it entails both the performance of the self by *individuals*, including in online settings and a set of techniques used to perform a *group or category*, such as professions (e.g. academics).

The fictitious persona is widespread in various forms of arts and entertainment (games, theatre, novels, etc.), marketing and HCI (human-computer interaction). In software development and marketing, the persona has been used to represent practices, needs, motivations and behaviours of potential users and customers into archetypes to facilitate innovation and ideation. In these contexts, personas are understood as “fictitious, specific and concrete representations of target users” (Pruitt and Adlin 2010, p. 5). UX and HCI design in particular (Tomlin 2018; Chang et al. 2008) use personas to represent *a type* of user: a singular entity that stands for a collective—that is, target audience and user groups. Similarly, marketing and advertising practices across different fields see the use of personas as tools for audience research to figure out the needs, desires and wants of different populations. In these contexts, crafting a user persona follows a particular set of steps, including extensive research about users via qualitative interviews, existing data sources, analytics, and informal or anecdotal observations (Humphrey 2017; Ricci et al. 2018).

The concept of a persona has also been a central object of study and analytical tool in new media and cultural studies. Beginning in celebrity studies (Marshall 2014), the concept of “persona” informs the study of the performance of the self by everyday social media users, micro-celebrities (Marwick 2013, 2015) and influencers (Abidin 2016), and has led to the emergence of a “persona studies” field (Marshall and Barbour 2015 and Marshall et al. 2015). Here, the use of personas helps researchers understand how media affordances configure behaviours shared by user categories. In other words, the analysis of personas and their formation involves the study not only of users but of digital objects as well: Marshall et al. argue that personas can be understood as “networks of digital objects with algorithmic components that have aesthetic and affective properties that enfold in a series of inter-objective and subjective fields of relations” (2019, p. 97).

As a method focused on processes of figuration, understood as “the activation of methodological potential in a process that is neither teleological nor mechanistic (...), but instead is a becoming-with” (Lury 2021, p. 40), the aim of the research persona is not to inform product design but to allow access to situations that enable the researcher to understand

how digital infrastructures respond to user practices and how these responses are in turn experienced by the users. The aim is to use the persona as a new media research device for studying platform personalisation and apps by locating the research amidst personalisation flows.

In the context of studying search engine personalisation, Feuz et al. (2011) have used fictitious Google accounts with carefully curated web histories to explore features of personalisation on Google Web Search. Relatedly, the walkthrough is a method for critical socio-cultural analysis of apps from a user-centred perspective (Light et al. 2018; Dieter and Tkacz 2020; Weltevrede and Jansen 2019). It invites the researcher to create a fictitious user persona to gain access to the platform features and interfaces to be studied. For example, Dieter et al. make a case for the research persona in the context of studying apps as a “methodological user surrogate, enabling access to app interfaces while facilitating heterogeneous research situations” (2019, p. 5). Notably, the notion of the “research situation” helps distinguish the research persona method from applications in other fields. For the persona to become a research device, it needs to be enlisted in and aligned with the purposes of research. How the persona is configured, that is, what decisions are made about the sites, digital objects, activities and connections that make up the persona, depends on the research question and objectives. The research persona can involve research techniques to obtain otherwise unavailable data and insights. For example, the use of personas in marketing and advertising research involves various methods to collect data about users and their characteristics, needs and situations (Caballero et al. 2014; Armstrong and Yu 1997). As well, research personas can be both automated (e.g. social bots) or directed by human actors. In social research, personas can be used to study spaces and processes that would otherwise be difficult to access. For example, ethnographers may adopt a persona when they undertake covert research (Hine 2004).

Personas are also sometimes used as a fictional device to get to the truth of a situation. The use of fictive measures as opposed to relying on already-observed facts resembles a technique used by the New Journalism movement (Hollowell 2017; Pauly 2014) in the 1960s and 1970s, and more recently in journalistic investigations such as Roberto Saviano’s book on the global traffic of cocaine (2016). Here the recourse to

fictional elements and speculation inspired by imagining what must have happened aims to make a situation more real and authentic to the reader. In such deployments of the persona, imagined elements are not antithetical to understanding lived realities. Rather, as in fiction writing, it can be a resource, a speculative point from which the process of figuration takes shape. Imagining other persons is key to developing empathy and understanding of the social, economic, ideological and cultural factors that deeply influence people.

Configuring the Research Persona: Methodological Considerations

With these points in mind, we situate the research persona as methodological experimentation alongside methods taken up by design, sociology, and media studies that engage speculation as part of the research apparatus (Dunne and Raby 2013; Wilkie et al. 2015, 2017; Benjamin 2016).

More specifically, we draw on three methodological approaches. First, following digital methods principles, we acknowledge that researching digital objects, whether users, content or behaviours, requires medium-specific methods (Rogers 2013). Digital methods track the various forms digital objects take as they circulate from back-end to interface and from one platform to the next. This approach informs the creation and use of the research persona in such a way as to make possible the tracing of the various digital objects that configure it: from profile information and images to status updates, likes, location and connections with other users. It also prompts us to attend to how the platform's personalisation algorithms respond to the persona's actions and features. In turn, the research persona also enriches the digital methods repertoire. Digital methods research often focuses on public platform spaces such as pages and groups and on research approaches that cultivate the "view from above" mentioned earlier (such as through the configuration of a "research browser" which seeks to disentangle the researcher from browser histories, preferences and personalised results, or through API (application programming

interface)-based data collection). To complement these approaches, the persona offers a way to examine private and personalised user spaces, such as the news feed and other personalised recommendation spaces, as sites of user figuration.

Secondly, we take the sensibility towards the inseparability of collective and individual experiences from digital ethnography and participatory design. This means understanding the becoming of users as connected not only to the technologies surrounding them but to the actions of other users with whom they are algorithmically affiliated.

Thirdly, we draw on speculative methods (see, e.g. Wilkie et al. 2015, 2017) and performance studies (see, e.g. Madison & Hamera 2006). The research persona is a speculative device; it involves producing an artefact to prompt an algorithmic personalisation situation that is inhabited over a period of time. Our collaborators, the scholars and artists Ioana Juncan and Alexandra Juhasz, pointed us towards character-building techniques from theatre practice to create such an artefact, such as those taught by Elmo Terry-Morgan at Brown University.⁴ These techniques, which encourage the research team to collectively imagine the persona's background and life story, significant life events and relations, as well as how they look, speak and think in their everyday life, evoke empathy within the researcher for an individual who might be situated amongst these flows in daily life, and are crucial to thinking through how a particular person would react to different types of content and affective charges.⁵ From this position of the speculative user experiencing personalisation, researchers can investigate and problematise the work that algorithmic recommendation systems do as part of manipulative information flows. This lends insight into the effectiveness (or lack thereof) of flows of mis- and disinformation. It is also an inventive device in its experimental, modifiable and situation-specific approach (Lury and Wakeford 2012) to making visible, researchable and accountable the social and technological processes that integrate manipulative personalised information flows.

⁴<https://www.brown.edu/academics/theatre-arts-performance-studies/elmo-terry-morgan>

⁵For more details on the fictional persona construction exercise run by Ioana Juncan and Alexandra Juhasz as part of the project The Research Persona as Digital Method, see <https://wiki.digitalmethods.net/Dmi/SummerSchool2019ResearchPersonaAsDigitalMethod>.

Three Examples of Research Personas

To become a research device, the persona needs to be aligned with a research apparatus containing questions, objectives, research angles, analytical lenses and a particular narrative style (Marres and Gerlitz 2016). Furthermore, the configuration of the research persona takes on different forms depending on the research questions. In this section, we explore three ways of configuring research personas to address different lines of inquiry, as summarised in Table 5.1.

To further explain this, let’s go back to how an online user is perceived by different layers of digital networked media. From the perspective of

Table 5.1 Three examples of how research personas can be configured

	Interface persona	Infrastructure and algorithmic persona	Speculative persona
Research aim	To examine platform-specific features and methods of personalisation (e.g. registration, data fields and analytics).	To trace the back-end circulation of user data across platforms.	To examine the interplay between user actions and content recommendations on the platform/app frontend.
How is the aim addressed	By assembling user personas informed by examination of platform affordances and use cultures.	By assembling app user personas and using software tracking tools to examine back-end data circulation prompted by the persona’s use of an app.	By assembling user personas informed by character-building techniques from theatre practice, as well as recording content recommendations and collectively imagining the personas’ responses.
Example	Studying affordances and cultures of persona formation on Facebook.	Studying back-end user data flows on dating apps.	Studying personalised information flows on Reddit.

the infrastructure, which involves networks linking together platforms, apps, data trackers and so on, the user is a source of data. This data is provided by the user (e.g. login, likes, comments, posts or banking information), as well as derived from monitoring and stored information (e.g. device used, quality of connection, location of connection, credit rating information or connection time). The infrastructure, in turn, can be used to aggregate data flows, not only to group users together but also to link diverse data about the same user on different platforms, apps and sites, so that, for example, buying patterns on one website become part of the personalisation process on a social media platform. At the back-end infrastructure that hosts these informational ecosystems, the kind of persona that needs to be developed is what we call an *infrastructure and algorithmic persona*. This particular type of research persona is designed to be recognised by a system (e.g. an app or a social media platform) that tracks the persona across platforms, websites, apps and so on.

In one of our research projects, we used research personas alongside software tracking tools to follow the circulation of user data on different networks and platforms via apps.⁶ We focused on dating and gaming apps to capture “app events”, such as the processes by which two users are matched with each other or swiping an advertisement in dating apps to capture the data connections that are established in the back-end. In this particular research project, we paid attention to tracking the data emanating from the device (in this case, a smartphone) that our persona was using. We created two research personas and experimented with the level of profile detail necessary to orchestrate a match between our research personas. Sketching out broad partner interests and restricting the geographical proximity proved enough detail to facilitate the match. Furthermore, to ensure that our research personas are not accidentally conflated with existing dating app users, we ensured that the personas were unique: we avoided generic names, as well as first name and last name combinations that already existed. However, the socially meaningful event of the match is a data-poor moment in the back-end of dating apps, which becomes apparent when compared to the app event of swiping an advertisement (Fig. 5.1). To trigger advertisements on dating apps,

⁶<https://wiki.digitalmethods.net/Dmi/SummerSchool2019ResearchPersonaAsDigitalMethod>

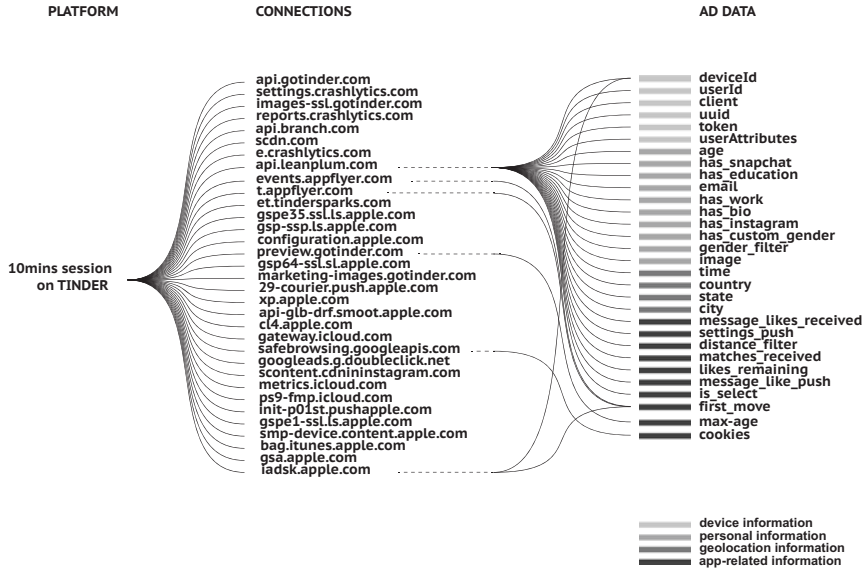


Fig. 5.1 The app event of swiping an ad: Data shared with ad networks using Tinder. Visualisation by Alice Ziantoni and Noemi Schiavi (Density Design), Digital Methods Summer School 2019

we experimented with how much profile detail, user activity and account connectivity is required. Installing a dating app and logging in with a new research persona account on one of our personal phones immediately triggered ads in the dating app. In contrast, none appeared on a clean research phone, signalling the relevance of the embeddedness of the research persona account in an active device and connected media ecosystem. Compared to the match, swiping an ad is a data-rich app event that allows us to further define the roles of apps within the networked economy as brokers of user data (Weltevrede and Jansen 2019). These initial explorations suggest that app events are multifaceted and simultaneously become manifest and meaningful on the user frontend and the app/server back-end in different figurations.

The user takes on a different form from the perspective of the digital user interface. Here, instead of data, what is perceived is a series of media objects: profile and other pictures, for instance, name, content creation and reactions (via like buttons, for example) to other content and users.

The use of *the interface persona* brings to the fore the choices made in how a person presents themselves. The aim is to better understand affordances and cultures of persona formation across different platforms. This includes the kinds of platforms and apps they typically would use and for what purposes, the types of vernacular modes of expression they would use depending on their particular ways of being, and the kinds of communities they would want to belong to. Here, it is the construction of the persona as an everyday user in the frontend interface that becomes the central focus of analysis. It requires that the researchers review several user profiles to get a sense of how people act within specific online communities, depending on their biographical details.

Research Protocol on Interface Personas from Digital Methods Summer School 2019

What is the data space of persona-making according to different platforms, devices, infrastructures and media spaces?

Considerations

- What are the data fields and categories which are available to advertisers and others who use platform data?
- How are persons rendered legible and intelligible using data?
- What are the data fields which are available to users when they sign up and use a platform?
- What insights from autoethnography and walkthroughs could be relevant for the creation of a research persona?
- How are data spaces of persona-making organised across platforms, advertisers and other actors?

Protocol

- Select a platform or device (e.g. Instagram, Facebook, Twitter)
- Map/list data fields/flows that make up the user
 - *This could be based on the qualitative analysis of platform interfaces (including the advertising interfaces), platform APIs and data, documentation, third-party platform features, etc.*

The interface persona, which borrows heavily from the walkthrough method and UX design, does not involve the persona interacting with other (non-fictional) users. Rather, it is used as a device to attend to how platform features and cultural practices are involved in personalisation. We see this approach as particularly useful for setting up coding schemas to analyse, for instance, modes of engagement and the rise of new vernacular language and practices. This approach allows the researcher to focus on user engagement with content and the kinds of community building that emerges from such interaction. Critically as well, the interface persona pushes beyond questions of content in mis- and disinformation towards questions of community practices and values and how trust is built among users.

The third kind of research persona is the *speculative persona*. This involves the creation of a complex character to attend to the different affective resonances that media objects, such as a fake news article or a politically biased meme, can have with users, and how this, in turn, cultivates and strengthens specific modes of action, from voting choices to participating in demonstrations and illegal activities. The speculative persona has a unique name and a face (e.g. generated via AI), and a rich and detailed biography.

The speculative persona design is a collaborative process among researchers, with one of the purposes of the collaboration to bring to the fore and challenge researchers' preconceptions and assumptions. Our collaborators designed a persona on personalised misinformation flows in the Canadian context who was a young 22-year-old white man living in a post-industrial city in Ontario (see Neville and Langlois 2021). The research group worked against creating a stereotype by including precise details about the character to develop a life story representing the potential features that might affect detailed personalisation flows that rely on emotions like grievement, entitlement or economic frustration. For example, they imagined the character as having grown up watching the status of one's middle-class parents disappear and frustrated by liberal politicians. Actively borrowing from theatre techniques, the researchers created a persona that they could relate to and empathise with rather than a device or stereotypical model to get at data. Inventing life details was key to identifying the persona's worldview regarding both interpersonal relationships and interest in

specific political and social issues. Deep consideration of how the persona thought of himself, what kind of hobbies he engaged in and the kinds of relationships he was pursuing further helped create a rich character. In the end, the character was derived from both sociological knowledge (e.g. available studies and media reports) and personal knowledge (e.g. friends and family members who had developed far-right tendencies or who had similar life experiences) on the part of the research group.

Once constructed, researchers then activated the persona on two platforms that corresponded to his profile—Facebook and Reddit—and subscribed the persona to a range of subreddits (from relationship advice to gaming to conservative and alt-right politics) as well as Facebook groups dealing with local politics. During weekly sessions, they recorded the recommended content for their persona on these two platforms, and as a group, discussed how the persona would react to different recommendations and why. This made it possible to understand the content, style and tone the persona would adopt in interactions with platform content. By liking some of the content, they were further able to see what kinds of recommendations were algorithmically provided. In so doing, they paid attention to how mis- and disinformation content can be tailored in many different ways, not only through different media forms but also through different rhetorical styles (e.g. passionate vs pseudo-scientific).

In sum, the speculative persona enables the researcher to gain perspectives and insights into how algorithmically mediated content may be encountered and experienced. It serves as a space where researchers may feel and imagine how the persona is touched, provoked, angered or saddened by online content. It also enables speculative understanding about how manipulative personalised information flows cultivate (pre)conscious affective responses and, as much as possible, alternative ways of understanding the world.

What the Research Persona Opens Up

As discussed previously, the persona method allows researchers to capture flows of information that work to configure the experience of individual users who interact with various content online. Unless we

use autoethnographic techniques, these flows interacting with users—whether algorithmic recommendations, media objects or images, or emotional comments—and users’ affective responses to them are typically challenging to study. Using the research persona allows the researcher to enter a manufactured political positionality similar to (but not equivalent to) the situated experience of a user belonging to a particular community. This allows the researcher to experience similar flows of information and media objects as everyday users as they sit and interact amongst them. While this positionality does not enable us to address the question of how an actual user or certain demographic sees and responds to content, it does open up the possibility of exploring what platforms show in relation to what users do, that is, the dynamics that emerge between user practices and algorithmic recommendations in experimental settings. In this setting, the researcher’s experience itself becomes the object of analysis, as opposed to the data or responses of others online. In this sense, the research persona can be considered a method that sources its findings from embodied processes that happen at the level of the researcher themselves, as they find themselves encountering content, triggering data output and responding in various affective ways (confusion, intrigue, anger, excitement, etc.).

In other words, the research persona is not meant to further a researcher’s interpretation of a subcultural space or represent that space through description. This is because a cultivated positionality cannot be said to *represent* the experiences of other users in hypothetically similar online/political positions. While the persona builds on observed knowledge of online political trends (Haseman 2006; Snyder-Young 2010; Elliot 2017), its primary source of knowledge is the experience of the researcher themselves as they situate themselves within digital networks and record their embodied experience, from sights and semiotic interpretations to affective responses. Because of this, the research persona can be considered to follow other experimental and performative-ethnographic methods that change the relationship between the researcher and the researched (Pollock 2006). Here, the research persona no longer marks the researcher as “subject” and the interlocutor as “object of study.” Instead of existing as separate entities, the research persona turns the researcher’s embodied, interactive experience with information flows and other digital actors

(homophilic networks, texts and images, and haptic platform features) into both the one who studies and the one who is studied. Through this recursive approach, the research persona allows the researcher to encounter and thus map specific interactive moments between themselves and the digital figures and entities surrounding them, effectively bringing to the fore the figuration work of automated data exchanges, taken-for-granted communicative affordances, and (pre)conscious habits and reactions that previously avoided critical analysis.

While the research persona borrows some techniques from covert research, it modifies these in significant ways to reflect the diverging goals that it serves. Whereas covert research methods in sociological or anthropological studies have seen the researcher take on a fake identity to gain access to hard to reach or precarious social spaces (Calvey 2008), such as underground drug-distribution networks or Neo-Nazi organisations (Shoshan 2016), the persona method is not being used to study particular social groups. Rather, the persona method examines the dynamics that emerge between algorithms, platform infrastructures and users. Performing a fictitious identity in relation to the studied groups is essential in this process. In contrast to this, concealing the identity and aims of the account is not a necessary condition of research when using the persona method since the purpose is not to study particular groups of users (as is often the case with covert research). Instead, the interest is in observing the responses of the medium, both on the front end (e.g. in terms of content recommendations) and on the back-end (e.g. in terms of data exchanges). Different options are thus available to the researcher using this method. The researcher may opt to make the persona account public, ensuring that its fictional character and its research purpose are clearly stated in the user profile, and perhaps including a webpage that provides more information about the project and a means by which the researchers can be contacted for more information by users. The researcher may also opt for a private account whose profile and activities are not visible to other platform users and respond only to accounts that were not linked to specific individuals. While the latter option may minimise the possibility of users initiating interactions with the research account, this decision may also shape information flows in ways that inspire further investigation. In either case, as Light et al. (2018) suggest, what is

important is that the researcher devises strategies for responding to potential interaction attempts from other accounts to ensure not only that harm is avoided but also that relations cultivate care, empathy and mutuality as much as possible (see, e.g. Tiidenberg 2020).

While being reflexive in their analysis, in covert research, the researcher does not include or feature themselves as the primary object of study. Rather, the majority of their data is sourced from the behaviours or conversations of their interlocutors. Covert research is classified as such when there is information withheld from interlocutors to gain access to information or data provided by such interlocutors (Calvey 2008). Since the object of study in the research persona method is the dynamics of personalisation, this method is more appropriately qualified as a performative or inventive approach to evoking findings (e.g. Culhane 2017) than a covert study of given individuals or groups.

Regardless of these distinctions, the method raises important ethical and legal challenges which require thorough consideration. While the precise configuration of legal and ethical considerations to accompany the use of this method depends on the purpose of the research, and the legal frameworks in place, a set of concerns demand attention. First, while our application of the research persona avoids interactions with individual personal user accounts, the use of the persona nevertheless implies participation in the platform and particular forms of interaction. For example, to cultivate an algorithmically curated environment for the researcher to experience, the persona may interact with public platform content by, for example, clicking on news articles or blog posts and following public pages. These actions are recorded by the platform and made available via its various interfaces, including being visible to users. In designing research with personas, it is important to consider how these actions may be experienced as misleading or construed as deceptive and possible harms that could arise as a result. Ethics boards in different countries and research guidelines in different disciplines may have differing understandings of research involving these techniques. Some may see the use of some of the techniques described above as *de facto* leading to covert research and recommend that researchers carefully broach this question when designing their research projects. We recommend in

particular that in approaching ethics boards, researchers give careful consideration to unintended consequences and harms.

The process of generating and maintaining a research persona also raises other questions regarding ethical research, given its resemblance to tactics used by marketing research. Similar to the above examples of covert ethnographic work, marketing research tends to use the construction of a fake or covert profile to gain information about other users—recording their likes, the nature of interactions or personal networks. In contrast, the research persona uses the embodied experience of the user-researcher to provide a nuanced examination of the particular networked positionality cultivated by the research persona's interactions. In this sense, the research persona also differs from previously discussed marketing tactics' use of personas to typify and gather information about other users. While the persona has previously been used as a device to *know persons*—whether through understanding customer needs, more precise segmentation for marketing, to ensure that users are better catered for by-products and services or to gain access to social spaces and communities—we are interested in how it may be repurposed as a device to *understand personalisation*, including the role that platforms, data and algorithms play in shaping contemporary sociality and in producing (sometimes troubling) associative spaces and dynamics.

While research personas may offer fresh perspectives and promising lines of inquiry for new media research, they should be used carefully, not just in compliance with relevant legal and ethical rules, but with consideration of other persons, communities and users as a central concern in the research process. Creating one or two new profiles on large platforms such as Facebook and Reddit—each with millions of users and filled with fake and empty accounts—to study algorithmic personalisation may be less troublesome than using them in smaller groups or more intimate settings. Given that fake and fabricated accounts are now widely studied, one would not want to inadvertently or unthinkingly contribute to proliferating the problem. In line with recent approaches to ethics in internet research, we advocate an ethic of care regarding the specific circumstances and communities that may be affected by the use of such techniques (Tiidenberg 2020).

Apart from these concerns, the use of personas may not conform to some of the terms and conditions of platforms or apps like Facebook, which have attempted to mandate the use of online profiles. Such platform practice itself (such as Facebook's 'real name' policy) is deemed unethical by many advocates (Haimson and Hoffmann 2016). In practice, many users have multiple Facebook accounts and aliases for various legitimate reasons, such as further security from trolls, differentiating between work and personal spheres, or building new family and friend networks. Not complying with platform terms of use is an object of ongoing debate in internet research (see, e.g. Tiidenberg 2020; Marres 2017). The extent that this provides an ethical dilemma is currently the topic of public and academic debates that weigh the need for public scrutiny of large platforms like Facebook in the context of the problematic effects of personalised information flows and unbridled data-mining rights held by such platforms (see, e.g. Rieder and Hofmann 2020).⁷ Indeed, much essential research into platform and algorithmic bias requires methodological approaches that would be considered to not comply with legal terms of platforms, and yet may often be sanctioned by ethical review boards and peer review procedures due to its potential contributions to the public good (see, e.g. Eriksson et al. 2018; Sandvig et al. 2016). This point is also raised by Marres (2017), who argues that the preoccupation with compliance with terms of service of platforms whose own functioning often raises ethical problems, may distract from the imperative of interrogating the problematic role of these platforms in reconfiguring collective life, which would bring additional ethical problems.

As an inventive approach (Lury and Wakeford 2012; Elliot & Culhane 2017), the research persona is a re-imagined way of using the researcher's

⁷For more detail, see in particular the Association of Internet Researchers Ethical Guidelines 3.0 that further delves into how platforms' terms and conditions are being fought against by the American Civil Liberties Union: <https://aoir.org/reports/ethics3.pdf>. Also see *Spotify Teardown* (2019) for an account of the ethical and legal struggles over corporate terms of use. Christian Sandvig in the US recently won a lawsuit that violating a website's terms of service does not violate the Computer Fraud and Abuse Act (<https://www.eff.org/fr/deeplinks/2020/04/federal-judge-rules-it-not-crime-violate-websites-terms-service>).

positionality to open up space for conceptualising and mapping the processes of figuration and subjectivation that occur through digital flows of information and content across social media. Given its creative and performative features, we propose that the persona method be combined with participatory arts and design practices, such as material artefact and prototype design, co-design workshops, creative writing and situated performing arts. Deployed in these contexts, the research persona can act as an “elicitation device” (Marres 2017; see also Lezaun and Soneryd 2007) that prompts engagement, debate, collective learning and empathetic imagination.

An example of this can be found in the interactive online theatre show *Left and Right, or Being Who/Where You Are*, directed by Ioana Jucan (2021). This digital theatre performance developed an experimental and participatory process where actors situated themselves in the worldview of various politically charged characters. These characters were inspired from other types of qualitative online observation, but their development into unique characters emerged from the actors’ use of the persona method; actors engaged in interactions with their online and offline environment to cultivate an embodied experience that could inform their character development. Apart from insights provided to researcher/performers, uptake of the research persona in this setting also provokes the audience to think of political identities not as static or unalterable but rather as figurations resulting from relational, embodied processes that occur over time and with technology through interactions. Notably, this kind of use of the researcher’s positionality as both investigator and situated participant to produce theatrical insights is not without precedent and is part of new creative ways of presenting and thinking through embodied experience and performance (see *Performing*, Kazubowski-Houston 2017).

In the end, revealing the processes of configuration that shape users online via interactions with information flows is the key insight developed by the persona method; how these processes are explored or communicated either through writing, performance or other creative methods is a flexible enterprise.

Conclusion

The research persona is a means of figuring the co-construction of user experiences and behaviour at different levels of mediation, from back-end to interface to embodied experience. There is a definite artificiality to the figuring process that the persona approach opens up as it creates experimental situations. These situations may be envisaged as experimental sites through which data flows, and where algorithmic processes and other personalisation systems and affective resonances can come to the fore. This artificiality thus opens modes of inquiry into spaces and dynamics that would not be possible to analyse otherwise. In that regard, the persona is both a research method—a way to set up situations where experiments and analysis can happen at all three levels of information infrastructure, interface and subjectivation—and an object of research. Its core feature is its refusal to set up critical distance, allowing reflection on the relationality between researchers, those being researched and the platforms that participate in and enable these interactions. Only by constructing modes of encounter, even if starting with the imaginary as an entry point, can we start figuring out how to reinvest in digitally mediated social relationships and formulate principles for new types of personalised information flows.

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