Research Methodologies for Participants Experiencing Vulnerability: A Transformative Service Research Perspective

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Abstract

Understanding vulnerable consumers when conducting Transformative Service Research (TSR) is essential but these consumers and their contexts are often complex and difficult to research. Despite a movement towards TSR research methodologies suitable for studying vulnerable participants and their contexts, a comprehensive framework that can guide service researchers is lacking. The purpose of this paper is to investigate appropriate methods, procedures, and protocols that permit researching a wide range of vulnerable groups and exposures to vulnerable situations in TSR. This is undertaken via a review of the literature and the authors' reflections of their experience researching vulnerability in various configurations (e.g., disasters, refugees, healthcare, disability, and older people). Through an iterative process of personal case reflections and group discussions blended with extant literature, patterns and insights regarding appropriate research protocols, techniques, processes, and sampling are identified. These insights contribute to the development of a comprehensive TSR framework in five research method areas including 1) consideration of the context, researcher, support persons and participants, 2) recruitment considerations relating to sampling, 3) recruitment considerations in terms of ethics and set-up, 4) data collection considerations relating to research protocol and set-up, and 5) data collection considerations. The framework can guide both academics and practitioners to enhance research outcomes for both participants and researchers.

Introduction

Research that understands the contexts and experiences that vulnerable groups (e.g., refugees, older people, people with disabilities or in disaster situations) must navigate, is vital to enable suitable subsequent service provision and ensure wellbeing (Chen et al., 2021; Rosenbaum et al., 2017). A stream of literature – Transformative Service Research (TSR) – is devoted to understanding vulnerable consumers and the role services play to ensure their participation, inclusion, and wellbeing (Dodds & Palakshappa, 2021; Finsterwalder et al., 2021; Hepi et al., 2017). In a service context, vulnerable consumers are defined as people considered disadvantaged in some way, resulting in either their exclusion from or difficulty in accessing services, unfair treatment during service consumption, or challenges in exiting services (Finsterwalder et al., 2021; Rosenbaum et al., 2017). Despite growing research in this area and recent attempts to provide guidance to TSR researchers dealing with vulnerable groups (see, for example, Azzari & Baker, 2020; Dodds & Hess, 2021), there appears to be no comprehensive TSR methodologies framework to guide research that considers a broad range of vulnerable groups and contexts; and outlines methods and protocols that can be implemented.

To date the majority of TSR research with vulnerable consumers tends to focus on a specific context and relies on methodologies, such as surveys, in-depth interviews and case studies, with standard procedures for recruitment (Lariviere & Kandampully, 2019). However, these more traditional research methods and procedures can be problematic when researching vulnerable consumers (Blocker & Barrios, 2015). Therefore, it is critical to understand what constitutes appropriate and sensitive research methods, processes and protocols for a wide range of vulnerable consumers in their specific contexts to ensure

beneficial research outcomes (Azzari & Baker, 2020; Dodds et al., 2018; Finsterwalder & Kuppelwieser, 2020).

Along with a specific call for research on methodologies for researching vulnerable groups, service scholars have also been challenged to consider vulnerable consumers in service settings (Rosenbaum et al., 2017) to elevate their human experience (Fisk, 2022). Additionally, there is a growing demand for research methods and procedures that not only ensure that the voices of vulnerable consumers are heard, but also safeguard the wellbeing of the participants (Azzari & Baker, 2020; Jafari et al., 2013). The overall purpose of this paper is to investigate appropriate methods, procedures and protocols for researching a range of vulnerable consumers in TSR and distil these in a unifying framework to provide better guidance for service researchers. The overarching research question directing this investigation is – what research methods, procedures and protocols are appropriate for researching a variety of vulnerable groups in their specific contexts?

The paper draws on extant literature on vulnerable consumers in various contexts blended with the authors' experiences of researching vulnerable groups in a range of TSR scenarios including disasters and crises, refugees, people with special needs, and the aging sub-population. This wide range of contexts enables the development of a comprehensive and unifying TSR methodologies framework for researching vulnerable consumers extending the work of Azzari and Baker (2020) and Dodds and Hess (2021). The framework can be used by researchers focused on service issues related to a broad spectrum of vulnerable groups. We organise the paper as follows. First, we discuss literature on TSR and vulnerable consumers to provide a background to our research. Second, we introduce the research participants and contexts that are examined in this study and provide an overview of research methods and protocols currently used in each of these contexts. Third, we describe the reflexive case method used to examine each authors' experience, and fourth, we provide a summary of

individual reflections to show the variety of methods and protocols used in the various contexts. Lastly, drawing on these and the literature we present and discuss the TSR methodologies framework which outlines five building blocks.

Literature

Transformative Service Research (TSR) Perspective

We use TSR as our theoretical lens. TSR aims at "creating uplifting changes and improvements in the wellbeing of consumer entities" (Anderson et al., 2011, p. 3). TSR focusses on services and the consumption of those services that aim to improve the wellbeing and enhance the quality of lives of consumers, and in some instances lead to personal transformation (Anderson and Ostrom, 2013; Rosenbaum, 2015). Services within the TSR context can include healthcare, social services, disaster relief, and refugee services among others (Rosenbaum et al., 2011). Generally, research in TSR examines the role services have on individual wellbeing, including its physical, emotional, psychological, and financial aspects, as well as the broader impact on family, community and societal wellbeing (Finsterwalder & Kuppelwieser, 2016). However, a specific stream of TSR is dedicated to studying vulnerable consumers within service contexts (Cheung & McColl-Kennedy, 2019; Finsterwalder, 2017; Rosenbaum et al., 2017).

TSR with Vulnerable Consumers

TSR acknowledges the importance of managing the vulnerability of both service providers and customers (Anderson & Ostrom, 2015). However, research priorities in TSR have been directed at vulnerable consumers in various service settings, to understand how services can meet their needs (Rosenbaum, 2015). Consumers can be vulnerable during consuming and experiencing services when they have access issues, feel stigmatized or suffer

discrimination (Rosenbaum et al., 2017). Consumers can also be vulnerable due to personal circumstances (e.g., a disability, chronic illness) and/or contextual situations (e.g., refugee status, natural disaster) (Kursan Milaković, 2021). In this sense, a vulnerable consumer is someone that experiences vulnerability and/or is disadvantaged in some way because of an individual state, individual characteristics and/or external conditions (Baker et al., 2005). A recent review of literature on vulnerable consumers proposes that "consumers experiencing vulnerability refers to unique and subjective experiences where characteristics such as states, conditions and/or external factors lead to a consumer experiencing a sense of powerlessness in consumption settings" (Riedel et al., 2022, pp. 120).

Despite the increasing interest in research on vulnerable consumers in TSR, there is a need for researchers to reflect on the methodologies and processes they are using to ensure they are appropriate and contribute to participant wellbeing (Dodds et al., 2018). Critically, as TSR scholars continue to investigate vulnerable consumers in an array of contexts, a comprehensive methodological framework to guide TSR research with vulnerable consumers is necessary. This current study fills that void by bringing together TSR scholars who have experience researching vulnerable consumers in four key TSR contexts, namely, crises and disasters, refugees, disability, and aging. To provide background to this research, key literature on each of the four contexts is now discussed and the common methods, processes and protocols employed to research vulnerable consumers are outlined.

TSR Research Contexts and Methods for Researching Vulnerable Participants

Crises and Disaster Research

Risk and vulnerability are co-constituted, with crises and disasters having the potential to disrupt entire service systems (Cheung et al., 2017). The context, magnitude and duration of crises and disasters as well as pre-existing inequalities within communities affect not only the ways in which traditional research methods are applied but also provide

opportunities for the application of novel methods (Wordsworth et al., 2021). A core ethical consideration in disaster research is the vulnerability of participants and whether individuals and/or communities affected can participate in the research as the capacity for re-traumatisation through the research exists (Wordsworth et al., 2021). Researchers must also consider the devastating effects of repeat, chronic and sequential natural hazards on communities that can exacerbate vulnerability (Drakes & Tate, 2022). Vulnerability in this sense refers to the increased likelihood of some populations suffering from the negative effects of natural hazards, thus, leading to a reduced capacity to deal with these effects (Wolf et al., 2013). A key consideration is, therefore, access to the physical research site, which may be restricted due to emergency management and on-going recovery efforts but also moratoria on research (Hall et al., 2016). A negative perception toward external researchers can exist leading to the enactment of protocols that stop unvetted community access following disasters. Thus, preferential access may be given to local researchers and research teams (Louis-Charles et al., 2020).

Extant research offers both protocols and methods for researching crises and disasters (Peek et al., 2020). Disasters tend to be localised leading to data collection delimited geographically (e.g., Canterbury (NZ) earthquakes) to a particular population (Wordsworth et al., 2021), often guided by issues of data perishability and, therefore, urgency of data collection (Hall et al., 2016). In contrast, crises such as SARS and COVID-19 can have regional or global effects, progressing through iterative cycles of escalation, peaking and de-escalation, where data perishability may be less important. However, the long-wave nature of crises such as COVID-19 can lead to both researcher and participant fatigue (Wordsworth et al., 2021), requiring consideration of research timing and methods. While funders usually prefer positivist research that quantifies disaster impacts and recovery outcomes (Witt & Lill, 2018), social researchers prefer qualitative methods (Peek et al., 2020).

Unsurprisingly, disaster research methods reveal a preponderance of case studies and surveys, with participatory action research growing (Peek et al., 2020). Essentially, a shift from qualitative and cross-sectional designs to longitudinal qualitative and/or quantitative designs that evaluate recovery trajectories of individuals, organisations and communities has been advocated for (Peek et al., 2020; Wordsworth et al., 2021). Qualitative methods can include daily or weekly video or audio diaries as well analysis of user-generated content from social media posts (e.g., Tiktok, Facebook, Twitter and Instagram). Digital data collection methods such as virtual ethnography, netnography and instant message interviews can improve access to affected populations (Wordsworth et al., 2021). While these alternative methods can capture the dynamic social environment post-disaster, it can also exclude vulnerable population groups such as the elderly and those living in remote rural areas with no or sporadic online connectivity.

Refugee Research

A refugee is defined as "someone who is unable or unwilling to return to their country of origin owing to a well-founded fear of being persecuted for reasons of race, religion, nationality, membership of a particular social group, or political opinion" (UNHCR, 2022). Refugees are a particularly vulnerable group of participants in research due to the uncertain circumstances and stage of their refugee journey, when either exiting their country, transiting via other countries (often including stops in refugee camps), or entering a host country for resettlement (BenEzer & Zetter, 2015). For example, the recent Ukraine crisis has exacerbated the vulnerable situation of many people (mostly women and children) fleeing and taking refuge in other European countries, potentially resulting in refugees' exploitation. Research with refugees has to consider the different vulnerabilities they face at each stage of their refugee journey and critical incidents that might derail their safety and wellbeing making them (even more) vulnerable (Finsterwalder & Kuppelwieser, 2020).

Service researchers have called for meaningful research into refugee related issues (Finsterwalder, 2017) and a growing TSR research strand focuses on improving the lives of refugees through transformative services (Boenigk et al., 2021a,b; Finsterwalder et al., 2021; Gokalp Aras et al., 2021; Subramanian et al., 2022).

A transdisciplinary systematic literature review of 102 journal articles from 2010 to 2020 on refugee related service research undertaken by Subramanian et al. (2022) shows that 68.6% of the research was qualitative, 15.7% was quantitative, 10.8% conceptual and 4.9% used a mixed-method approach, highlighting the primacy and dominance of qualitative approaches.

More narrowly, in refugee related TSR only few scholars have used empirical research, again with a strong focus on qualitative methods which were focus groups, in-depth interviews and netnography. For example, Boenigk et al.'s (2021b) focus group research explored barriers and access to critical services, such as higher education. Issues arose with the focus groups, including difficulty reaching potential participants due to their vulnerability and vulnerable living conditions. This is an issue also highlighted by Hepi et al. (2017) when researching "hard-to-reach" indigenous people. Another aspect Boenigk et al. (2021b) found was the need to use two moderators with one acting as a support person to build trust and ensure the participants feels safe. Importantly, gaining consent verbally is required as some cultures find signing documents problematic (Boenigk et al., 2021b). Gokalp Aras et al. (2021) used a combination of secondary data and in-depth interviews with Syrian refugees to investigate access to healthcare services. Interestingly, Kabadayi's (2019) study of Syrian refugees in Turkey and service employees' sabotage behaviour avoided primary data collection and relied on netnography of social media posts.

Healthcare Research

In TSR healthcare research, consumers of healthcare services are often considered vulnerable because many do not have the resources, capabilities, expertise, or power to actively engage with healthcare services and practitioners (Anderson et al., 2013; Johns & Davey, 2019). Furthermore, healthcare services are often complex and highly emotive because of the personal health of the consumer, unfamiliar environment, and potential risk (McColl-Kennedy et al., 2017b). The majority of TSR in healthcare has tended to implement qualitative methods that predominantly use interviews. However, in some instances quantitative methods are also implemented and are fruitful in gathering data on quality of life, wellbeing and behavioural intentions of healthcare consumers that can be generalizable (McColl-Kennedy et al., 2017a).

Novel methods are beginning to emerge as researchers recognise the sensitive nature of the context and vulnerability that many healthcare consumers experience (McColl-Kennedy et al., 2017a). For example, Dodds et al. (2018) utilise a qualitative longitudinal research approach combining narrative interviews and visual elicitation techniques to study participants with chronic health conditions. Depth interviews using techniques that elicit metaphors and memories of sensitive/vulnerable experiences can engage participants in the research process and unearth important thoughts and feelings (Azzari & Baker, 2020). Likewise, TSR scholars working on sensitive social health issues (e.g., youth alcohol consumption, diabetes, homelessness) have considered methods including co-design with participants (Hurley et al., 2018), family group interview techniques (Dodds & Hess, 2021), and community action research that includes other stakeholders such as doctors and healthcare workers in the research process (Ozanne and Anderson, 2010). Blocker and Barrios' (2015) study of homelessness implements an ethnographic approach which included

the researchers immersing themselves in the research context, informal conversations, in-depth interviews, ethnographic field notes and researcher diaries.

Important research protocols of TSR research in healthcare with vulnerable participants include: robust ethical processes and conduct such as mitigating unintended consequences, ensuring informed consent and transparency of the research process (Azzari & Baker 2020); deeply understanding the research context (Blocker & Barrios, 2015); and considering research design and processes such as utilising technologies (e.g., telephone, video conferencing) enabling accessibility and anonymity (Dodds & Hess, 2021). Recently, there has been a move towards participant-centric research whereby participants are central to the research process (Azzari & Baker, 2020) and a strengths-based approach where participants' capacities and capabilities are respected (Hamby, 2022).

Disability and Aging Research

In TSR research, people with a disability and older people are often considered vulnerable consumers due to their disability and age-related conditions preventing them from accessing services (Rosenbaum et al., 2017). Many of these vulnerable consumers feel frustrated and excluded, and therefore it is particularly important to consider their vulnerability in terms of access and participation in research (Saatcioglu & Corus, 2016). Of particular importance to these groups are research approaches that ensure participant agency and give a 'voice to the voiceless' (Rosenbaum et al., 2017). Approaches to research in this context often use a narrative or phenomenological approach to explore the stories and experiences of these vulnerable consumers. Hidden under the generalisations and stereotypes of society are stories that are often unheard (Baker et al., 2005). Such approaches are appropriate for understanding vulnerability because the storytelling enables participants to discover and reveal themselves (Saatcioglu & Corus, 2016).

An important aspect of researching in this context is accessibility and suitable research environments and set-ups (Dodds & Palakshappa, 2021). Snowballing techniques are often used to recruit participants and in some instances tapping into organisations and/or people with strong voices in the community that advocate on behalf of these groups is needed (Dodds & Palakshappa, 2021). Providing a suitable and comfortable interviewing set-up is critical to not only gaining depth of data but to ensure the wellbeing of the participant, for example, choosing suitable interview venues (e.g., at home or a place that has easy access for a participant) and the use of an interpreter (e.g., for participants with hearing impairments) (Abney et al., 2017). Groups in this context often feel frustrated with not being heard or stigmatized due to their disability or age, therefore a participatory approach is required that involves participants in the research process and includes people from these groups to be part of the research team (Clough, 2016).

Methodology

Our research adopts an interpretive approach utilising a case study approach combined with individual reflections of the authors with experience researching vulnerability in service research. There is a need for more reflexivity in service and consumer research to enable deeper insights into research methods and protocols with vulnerable people (Jafari et al., 2013; Thompson, 2002). The practice of reflexivity encourages the researcher to consider aspects of the research process and its potential impacts on both the researcher and participant (Jafari et al., 2013). Drawing on multiple research projects that span participants with various vulnerabilities, including the above-mentioned contexts, the researchers reflect on their experiences and the various methodological approaches used to capture the lived experiences and voices of the participants. A case study approach (Yin, 2018) enabled the authors' reflections to be compiled as individual case reflections to capture the various and nuanced

research contexts. Following this, a cross-case analysis was completed that culminated in a comprehensive and unifying framework.

We utilise both a deductive approach using TSR literature and a data-driven inductive approach from researcher reflections (Miles & Huberman, 1994). The process involved two key stages. In the first stage each author reflected personally on their experience utilising a pre-existing framework for researching vulnerable participants developed for a specific TSR context (i.e., adolescent vulnerable consumers) as a theoretical guide (see Dodds & Hess, 2021). Five key research method areas identified from the Dodds and Hess (2021) framework were used as a template for each author to reflect on and analyse their own experience in a specific context. The five amended research method areas included: 1) consideration of the context, researcher, and participants, 2) recruitment considerations relating to sampling, 3) recruitment considerations in terms of ethics and set-up, 4) data collection considerations relating to research protocol and set-up, and 5) data collection considerations around research techniques and processes. Each author created their own visual framework and wrote an overview of their reflection using the five areas as headings.

The second stage involved the authors sharing their visual framework and written reflection prior to coming together to discuss and identify insights, patterns and themes across the individual reflections relating to methodologies, procedures and protocols appropriate for TSR scholars that are studying various vulnerable consumer groups. This resulted in the development of a unifying framework. This stage implemented an iterative process of reflecting on the joint framework and zooming in on each author's individual reflection and zooming out to achieve generalisability.

Cases of Researchers' Reflections

In this section we provide a brief overview of three cases – 1) crisis and disaster, 2) refugees, and 3) healthcare, disability, and aging - based on each authors' reflection of their experiences with the research context/s and highlighting key methods and procedures used.

Case 1 – Crisis and Disaster (Author 3)

Context, Researcher and Participants

Author 3's research is grounded in crisis and disaster management focusing on resilience and wellbeing outcomes for individuals, organisations and communities. Previous research includes communities impacted by the Canterbury and Kaikoura (NZ) earthquakes, and more recently the COVID-19 pandemic, using both qualitative and quantitative methods. Research design and data collection in post-crisis/disaster contexts allow the author to gain access as an "insider" to disaster communities and engage with them, while demonstrating flexibility and sensitivity to individual circumstances. For example, some participants preferred interviews in group settings rather than alone due to aftershocks, which continued for a period of 14 months after the 2010/2011 Canterbury earthquakes. Attending community workshops on disaster recovery was key to building relationships with business operators and community group representatives following the Kaikoura earthquake.

Recruitment Considerations – Sampling

Sampling in disaster research is challenging from issues of accessibility to sites for research purposes, potentially posing safety risks for participants. Using community group leaders as entry points can be valuable as they can work closely with first-responders and social workers to identify participants and exclude those that are highly vulnerable. Snowballing can be particularly effective in identifying and recruiting participants. Rather than sampling at the individual level, researchers should also consider household level sampling to understand both individual and collective experiences of disasters and crises. In

both qualitative and quantitative research, such an approach can quickly reveal intra- and inter-household differences in participants' perceptions and experiences of the disaster. Researcher collaboration within and across universities is critical to prevent the same individuals being recruited for interviews on similar or different disaster issues, causing not only fatigue but also frustration if they cannot see visible changes after each successive interview round.

Recruitment Considerations – Ethical and Technical Set-up

Ethical considerations are paramount when dealing with participants from other cultural backgrounds, such as Māori and Pasifika communities in New Zealand, because they have different belief systems in relation to perceptions of the disaster itself and recovery and, thus, prioritise community vs. individual recovery differently. Further, whether consent should be written or oral is a key consideration for participants to feel included and cultural protocols have to be adhered to prior, during and after the interviews. Short-hand note taking should be considered as an alternative to recording as such a device can be a barrier to participation. The availability of wearable devices for participants to monitor their stress and anxiety levels (e.g., Fitbit, Garmin and Apple watches) can set the pace of the interview and the extent to which the researcher uses probing during the interview.

Data Collection Considerations – Research Protocol and Set-up

Beyond providing clear instructions, offering participants the option to bring someone as a support person can be important as interviews relating to crises and disasters can induce anxiety and stress, leading to strong emotional outbursts from participants. Capitalizing on online technologies can be particularly effective for interviewing participants during COVID-19, given social distancing and lock-down requirements, but clear instructions of how to use or download the "free" technology must be provided. Interviews in this context lend themselves to 'walking around the community' as an option. This provides participants a

sense of the researcher being interested in not only them but also the issues the community is facing.

Data Collection Considerations – Research Techniques and Processes

Several techniques are available to collect data in an unobtrusive way that maintain physical and emotional safety of participants in the immediate disaster response phase, when potential participants are focused on getting their lives back together. Physical and online diary methods, short-video methods, and observation methods can be less obtrusive than face-to-face interviews. In the disaster recovery phase, storytelling can be a particularly effective method, allowing participants to tell their lived experiences rather than the researcher reporting on their lives. Participatory action research is also desirable, where both researcher and participant collaborate and co-create, for example, wellbeing and resilience outcomes for the community. To prevent re-traumatization, scenario style questions, third-person interviewing techniques, and projective techniques are useful. In longitudinal studies, the widespread use of mobile phones and instant messaging apps by participants can facilitate data collection using multiple short-duration interviews. Rather than relying exclusively on interview or survey data, several physiological methods such as eye-tracking devices and other electrodermal activity (EDA) tracking technology (e.g., Empatica E4 wristbands) that can capture "unadulterated" emotional responses in reliving or remembering an experience can also be used.

Case 2 – Refugee Research (Authors 2 and 4)

Context, Researcher and Participants

Authors 2 and 4 have been situated in TSR and refugee related service research with author 2 bringing refugee research into the service domain. In line with results of the literature overview outlined earlier (Subramanian et al., 2022), research methods used are pre-dominantly qualitative. Refugee research contexts foremost concern refugees in phase 3,

that is, when exiting their refugee journey and settling in a host country. Several types of refugees can be studied, such as established refugees that have already resettled or newly arrived refugees. Here, particularly newly arrived refugees tend to be very vulnerable due to the recently completed refugee journey. However, traumas can persist and be present across the different groups making for very sensitive research participants. In such cases, familiarising oneself with resettlement procedures, refugee stories via secondary data, publicly available documents in preparation for empirical research is vital to immerse oneself into the topic, refugees' cultural values and how refugees might be feeling. Support persons, in the form of social workers at refugee shelters and / or interpreters / fellow refugees who understand the language can be vital for participant comfort. Not only should the researcher act as a shield to the refugee experiencing more vulnerability during the research process but the support person or interpreter can be an additional buffer to make the refugee feel more at ease and comfortable. Moreover, these third persons can provide vital feedback to the researcher on whether or not to continue with data collection.

Recruitment Considerations – Sampling

Sampling can be challenging due to the potentially high level of vulnerability of the participants and hence additional time is often required to recruit participants. For example, an additional layer of difficulty was added to the recruitment for one project where potential participants were exposed to a mosque shooting in Christchurch, i.e. the refugee participants' host country (NZ) and therefore the local refugee community dealing with the tragedy was unavailable for data collection. In general though, access is possible via refugee agencies' / shelters' social workers / community workers, volunteers, or refugees' peers. Workers / volunteers and fellow refugees play an important role in the pre-selection process to avoid data collection with particularly vulnerable refugees and to choose suitable candidates. Refugees are not meant to feel it is mandatory to participate in research activities and

experience an unequal power relationship because of their status, inexperience or lack of understanding. Moreover, selecting refugees who have completed orientation programmes can also assist in mitigating stress levels and making them feel safe.

Recruitment Considerations – Ethical and Technical Set-up

While ethical considerations are to be considered and implemented, such as informed consent, this process usually follows a very diligent and detailed ethics committee approval process due to the vulnerability of the participants. However, one aspect in this context is the need to sometimes have the information and consent form explained or translated by social workers, peers or interpreters and to seek oral instead of written consent.

Data Collection Considerations – Research Protocol and Set-up

Venues the refugees are already familiar with and feel safe in are vital, for example, resettlement agencies providing a secluded space. The agencies can also provide translators where needed. In addition, "gatekeepers", such as fellow refugees, community or social workers can be used as a bridge to build trust. Interview questions have to be carefully prepared to ensure no cultural and situational offences arise from their subjective nature.

Data Collection Considerations – Research Techniques and Processes

During face-to-face interviews being mindful about understanding the refugee experiences and showing respect accordingly by listening to participants' responses carefully and with empathy is very important. In addition, being aware of participants' cultural differences and diversity is vital as there are certain boundaries that are not appropriate to cross. Moreover, consistently monitoring participants' emotional reactions and providing breaks if necessary is important. A "do no harm" approach is vital as refugees have already been through a range of struggles along their journey before arriving to the host country and might still be experiencing stress.

Case 3 – Healthcare, disability, and aging (Author 1)

Context, Researcher and Participants

Author 1's research is positioned in TSR and focuses on vulnerable consumers with research projects spanning healthcare services, youth alcohol consumption, service inclusivity of people with physical disabilities, and aging. Utilising qualitative methods, including in-depth interviews and visual methods, author 1 is interested in understanding the 'lived experience' of vulnerable consumers. Critical to the research is being familiar with the research contexts either through personal experience (e.g., experience with healthcare services) or by immersing oneself in the context (e.g., attending public seminars and talking to advocates in the community and/or organisations representing people with disabilities, aging, or youth issues, and conducting secondary research).

Recruitment Considerations – Sampling

Author 1 has found that a vital aspect of recruitment is having clear selection criteria that enables the recruitment of research participants capable of participating and avoids people who are unwell, physically, or mentally unable or are very vulnerable. For example, when researching younger participants on sensitive topics like alcohol consumption, family groups were recruited not only to understand inter-household relationships, but primarily to use the primary caregiver as a support person and act as a protective buffer. This can help younger participants to engage in the interview and feel safe.

Recruitment Considerations – Ethical and Technical Set-up

Participants understanding of their ethical rights, such as privacy, confidentiality, and anonymity is essential and consent forms and information sheets that outlined the research in detail are given upfront. An important ethical consideration is the right for participants to discontinue the interview or withdraw from the research at any time. This is particularly important with longitudinal research that requires participants to be involved in multiple

stages over time. Any technical set-up of the research is the responsibility of the researcher/s, for example, setting up video conferencing links and ensuring the participant/s or support person can access the technology.

Data Collection Considerations – Research Protocol and Set-up

Careful attention is always given to participants' comfort and safety in the interview/research environment. Face-to-face interviews where possible are conducted in a place that is convenient for the participants. Various set-ups can be used based on the participant's choice, including participant's home or workplace, community meeting rooms (e.g., local library), or in some instances a quiet café. The researcher always has to adapt to each place to ensure the set-up is comfortable and private. For example, arranging seating to ensure proximal distance that feels physically comfortable yet enables the researcher/s to observe body language. Accessibility is a big consideration for participants with physical disabilities. Online research with youth and their families requires all members to feel comfortable on screen. The online environment provides a non-intrusive safe barrier for the younger shy participants who often sit just outside the screen or behind the adult or older sibling.

Data Collection Considerations – Research Techniques and Processes

Narrative style interviewing techniques are used to gain insights into the lived experiences of healthcare and disability participants. This interviewing style generally starts with asking participants to tell their story. This helps to create an environment that is safe, friendly, and conversational, encouraging a free-flowing style that captures each person's individual story. Online group interviews follow a semi-structured approach that allows every member to have their say on each question. Importantly, the online environment enables a second researcher to act as a research scribe who sits in the background and prompts the interviewer using private chat enabling greater depth of data. The use of visual elicitation that

requires participants to gather photos and images of their experiences of healthcare services is invaluable in terms of uncovering deeper unconscious thoughts, feelings and meaning of healthcare experiences.

Finally, an important aspect in these contexts is implementing a strengths-based approach. For example, when researching people with disabilities or older people it is important to be mindful of appropriate language and adapt to the individual. In some cases participants want to be referred to as 'disabled' or 'elderly', whereas in other cases, the appropriate language was 'people with a disability' or an older person. Critically, the researcher must be mindful of participants' knowledge and capabilities and giving participants an empowering experience and a voice.

Transformative Service Research (TSR) Framework and Implications

Based on the above individual case reflections, a subsequent cross-case analysis, and extant literature from the four contexts – disaster and crisis, refugee, healthcare, and disability and aging, we develop a unifying 'TSR framework for vulnerable participants' framework (see Figure 1). The illustration shows an extended version of the five key factors now including: 1) consideration of the context, researcher, support persons, and participants, 2) recruitment considerations relating to sampling, 3) recruitment considerations in terms of ethics and set-up, 4) data collection considerations relating to research protocol and set-up, and 5) data collection considerations around research techniques and processes.

At the core of the framework is the interaction between researcher(s) and research participant(s). Depending on the research context the two parties might interact directly with the researcher being the protective buffer aiming at mitigating the participant's vulnerability and maintaining their wellbeing throughout the research process. However, other contexts might necessitate additional people to be involved, such as support persons (e.g., social workers), peers (e.g., fellow refugees) or interpreters forming an additional buffer and

feedback loop for the participant. Around the researcher–research participant interaction the supporting and enabling factors of research protocol / set-up and research techniques and processes, sampling and ethical and technical set-up have to be designed.

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Several implications are important for TSR scholars and practitioners to consider when studying vulnerable participants in a range of contexts using both qualitative and quantitative methods to enable participant safety and wellbeing. These are outlined below.

Research Context, Researcher, Support and Individual Participant Implications

Research contexts can include vulnerable conditions and circumstances, sensitive information and unstable environments (Riedel et al., 2022). Familiarity and/or immersing oneself in the research context is critical (Blocker & Barrios, 2015). Deeply understanding the context enables the researcher to be inclusive, respectful and culturally/socially aware which helps co-create a non-intrusive and safe environment. If the researcher has no experience of the context then studying (or immersing themselves) prior to the research is necessary to personally reflect on other cultures and multi-cultural interactions that may impact on the research design and methods (qualitative, quantitative or mixed) applied to keep participants safe.

Researchers should consider adopting a strengths-based approach to help mitigate issues around inclusivity and vulnerability and ensure participant wellbeing. Such approach has its foundations in social work and views participants as resourceful and central to the process (Hamby, 2022). This can include co-design or co-creating the research process and/or meaning of the research, being careful with words and language, building on the participants' knowledge and strengths, looking for signs of stress or discomfort and giving the participant autonomy in the research, for example, to take a break, opt out of the research, or stop the interview. This can also include *support persons / peers / interpreters* who provide

participant support and access, including cultural and emotional support (e.g., support group/person available for the participant), practical support (e.g., access to interview, translator), and financial support (e.g., for transportation) to participate. This person or group needs to be cohesive, integrative, caring, and provide a feedback loop. All the above enables *individual participant*s to feel physically, psychologically, socially and cognitively safe and supported (Finsterwalder, 2021).

Data Collection Considerations and Implications

Research Protocol and Set-up

The research environment is critical and needs to be carefully set up to be safe, inclusive and appropriate to the context and participants. The researcher needs to be flexible and adaptive, for example, meeting in a place convenient and/or safe for the participant (e.g., transformative service provider's space), arranging seating to ensure proximal distance but enabling the researcher to interact and observe facial expressions and body language (Dodds & Hess, 2021). Timing too can be critical as many participants experiencing vulnerability are often experiencing stress or anxiety due to their circumstances, situation or condition.

Research Techniques and Processes

Qualitative methods are an appropriate methodology when researching people and groups experiencing vulnerability (Azzari & Baker, 2020). A variety of research techniques can be used, such as narrative/storytelling approaches, visual and projective techniques, diaries, off- and online focus groups, participatory and action research and walk around community approaches. However, also quantitative methods or a mix method can be fruitful in certain scenarios. There is an increasing opportunity to apply quantitative methods that are less intrusive and less time consuming. Irrespective of the choice, the fundamental consideration is that the methods and techniques are culturally and contextually appropriate and align with participant centric approaches that have been recommended for TSR research

(Azzari & Baker, 2020). Moreover, the ease of use and increasing availability of social media data offer opportunities to understand not only individual but group experiences by studying vulnerable consumer comments on community social media platforms.

Recruitment Considerations and Implications

Sampling

Sampling in research with people and groups experiencing vulnerability is challenging due to accessibility issues and levels/stages of vulnerability (Rosenbaum et al., 2017). Snowballing techniques are useful, however careful consideration needs to be made with regards to selection criteria to ensure only those capable of participating are recruited. Therefore, recruitment can involve specific groups (e.g., volunteer groups, cultural groups, community groups), services (e.g., services for seniors, refugee services), and professionals (e.g., social workers, doctors) to access vulnerable groups and ensure appropriate selection. Other important sampling considerations are the recruitment of support people and community and household sampling to understand intra- and intergroup experiences in vulnerable circumstances (Dodds & Hess, 2021).

Ethical and Technical Set-up

Ethical considerations are critical to ensure participants' wellbeing and safety. Full human ethics applications are often required involving the discussion of research methods and procedures with appropriate academics and cultural advisors. Other than the usual confidentiality and privacy aspects, key ethical considerations include: ensuring participants understand the meaning of consent and are willing and able to consent appropriate to their situation and/or culture, and be given the option to consent either in writing or verbally (Azzari & Baker, 2020; Wordsworth et al., 2021). The participant withdrawal process must be clearly communicated and pointed out throughout the research, enabling participants to

feel psychologically safe and comfortable to discontinue participation (Louis-Charles et al., 2020; Wordsworth et al., 2021).

With regards to technology and the use of recording devices, as noted in prior studies (Azzari & Baker, 2020), the use of recording devices and technology (e.g., video conferencing) should be kept non-obtrusive as these can be a barrier to participation, leading to socially desirable and formal answers. Researchers must ensure that participants have access to and can use the technology either themselves or via a support person.

Conclusion and Future Research/Researcher Implications

We contribute to TSR literature and research methods for participants experiencing vulnerability by developing a conceptual research framework that underpins the importance of participants' wellbeing, safety and inclusion in TSR. In doing so, we extend the work of Azzari and Baker (2020) and Dodds and Hess (2021) to incorporate a variety of research contexts and situations with vulnerable participants and include both qualitative and quantitative methods. The extended framework outlines five key factors with regards to how research protocol / set-up and research techniques and processes, sampling and ethical and technical set-up can be designed to ensure participant wellbeing. The framework can also be used as a platform for future TSR research that involves participants in vulnerable circumstances or situations and/or with vulnerable conditions in a variety of contexts.

Implementing this novel TSR research methods framework can help build important bridges with the community beyond the initial research project which can lead to establishing avenues for future research. For example, author 4 became a volunteer and advisor for the Refugee Orientation Trust (ROC) in New Zealand and has since assisted ROC with writing grant proposals and applications and introducing other researchers to ROC. Following this, ROC received a substantial grant which helped the organisation extend their services to refugees. Importantly, utilising our TSR research methods framework can not only aid with

enhancing research relationships with community organisations but the research can be transformative for the organisation itself. Participants can also find the process transformative. For example, author 1 found that participants often comment on the cathartic experience of telling their stories. Lastly, our framework can lead to researcher transformation enabling TSR scholars to be more in tune with vulnerable participants and the sensitive contexts they research.

Through the various methods and protocols identified in this study participants' wellbeing is maintained and enhanced. Although, this research focused on participant safety and wellbeing, researcher safety is also important and is an avenue for future research. By applying the TSR framework proposed, there is also an opportunity to build the resilience of participants, researchers and communities. For example, through stronger and more meaningful researcher-participant relationships, participants can experience less stress and anxiety and have a greater sense of how the research will positively affect them or the community. Through researcher immersion in the context, researchers can develop a stronger sense of the "real" impact of their research, thus contributing to their own resilience.

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Figure 1. TSR framework for vulnerable participants (expanded from Dodds & Hess, 2021)

Data Collection Considerations

Research Protocol / Set-up

- (Un-)Safe space, i.e., make as convenient for participant as possible to ensure minimum level of comfort and maximum level of confidentiality (+/#)
- Proximal distance that allows for the appropriate spatial gap between researcher and participant but is close enough to observe facial expressions and body language (+/#)
- Ability for respondent to feel that they are meeting the researcher at eye level, such as via seating arrangements (+/#)
- Timing can be critical (+/#)

Research Techniques & Processes

- Narrative or scenario style interviewing – open, friendly, conversational, positive / appropriate language (+)
- Utilize strengths and resources of participants (+)
- Watch for signs of stress or discomfort, allow for breaks, be conscious of when to discontinue (+/#)
- Options: visual elicitation - to aid discussion and uncover deeper thoughts / feelings; combination of face-to-face and online / phone; physical diary or video methods; projective techniques and third-person approaches; participatory action research framing (+)
- Use participants in co-design and/or for identifying additional members (+/#)
- Participant group research possible (+)
- Consider post-research interviews (+)

Research Contexts
Transformative, vulnerable conditions & circumstances, sensitive information, unstable environment and other actors

Protective Buffer 2

Researcher
Strengths-based approach, safe keeper, proximal distancing, non-intrusive but inclusive, culturally / socially aware and respectful, organized but informal

Protective Buffer 1

Support Person / Peers / Interpreter
Cohesive, integrative, caring, provide(s) feedback loop

Individual Participant
Physically, psychologically, socially and cognitively safe and protected, supported, valued, unintimidated, empowered

Recruitment Considerations

Sampling

- Ensure clear selection criteria to avoid those who are very vulnerable and not capable of participating (+/#)
- Potential screening through third party people / organizations / community - social workers, health professionals, first responders (+/#)
- Recruitment through cultural groups, volunteer groups, peers or professionals above (+/#)
- Apply snowballing method (+/#)
- Community and household level sampling to understand intra- and inter-group experiences (+/#)
- Encourage support people to participate and / or help facilitate (+/#)

Ethical and Technical Set-up

- Send through clear instructions, i.e. information sheet and consent form after obtaining ethics approval (+/#)
- Ensure participants understand their ethical rights (+/#)
- Be aware of cultural specifics, e.g., whether respondents from a certain culture shy away from signing documents (+/#)
- Keep recording device non-obtrusive (+)
- Ensure any technology used is appropriate; otherwise take written notes (+/#)
- Consider walk-around community approaches (+)

Key: + = qualitative research; # = quantitative research

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