

## “Deep Cover”: Identities and ethics in martial arts fieldwork

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8th IMACSSS International Conference Abstracts, Viseu (Portugal), October 10-12, 2019

Type: Oral communication

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### Abstract

Qualitative research in the social sciences typically requires a personal engagement with resource persons. The widely used participant-observation method requires that the researcher assume as far as possible the role of community member. Even when participant observation is not the chosen method, group members assign identities to investigators. Role assignment in martial contexts may range from the “intruder” who disrupts ongoing events (e.g., outsiders may not see “secret techniques”) to one who is allowed insider access, usually after having gone through some test or rite of passage. Data collected in “natural context” is ideal. The primary problem here is that act of observation inevitably changes phenomena under examination. The most effective means of gathering information in a natural context is by engaging in what is known in the Intelligence community as “deep cover” actually joining a community for the purpose of secretly gathering information. This, of course, brings with it serious ethical dilemmas. While it is clear that we must all address the issue of transparency vs. efficiency, most decisions actually are made on a case by case basis. I suggest that it may be time to develop a general set of guidelines to help us keep faith with informants and accomplish our academic goals of accurately depicting the martial cultures with which we engage.

**Keywords:** Martial arts; combat sports; qualitative research; fieldwork; ethics; identity; participant-observation.

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### 1. Introduction

Qualitative research in the martial arts and combat sports typically requires fieldwork whose goal is to obtain “native” knowledge of the phenomena under consideration. In the case of martial culture this knowledge is received in both the mind and the body. While quantitative research also requires “engagement” with one’s resource persons, the keystone of the qualitative method may arguably be participant observation, ideally “becoming a group member” to gather knowledge. This brings with it both methodological (how to become that which you are not) and ethical issues.

### 2. Objectives

The objectives of the current study are to explore the concept of “role” in qualitative martial arts fieldwork. The presentation goes on to assess the effectiveness, variables, and consequences of the various roles available to martial researchers. Both the methodological/technical and ethical dimensions of role choice are considered.

### 3. Methodology

The data on which the arguments are based were accumulated during more than twenty years of qualitative fieldwork in the martial arts, especially research with African-American cultural nationalists and post-Intangible Cultural Heritage (ICH) Chinese vernacular martial artists. The concept of qualitative fieldwork and related methodology are drawn from, *Fieldwork*, by Bruce Jackson (1987). The perspectives used for the analysis of the data are based in the performance centered approach to field ethnography, most notably the work of Roger D. Abrahams (2005) and

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Barre J. Toelken (1979). Toelken's notion of audience types and their impact on performance informs the classification of roles introduced in the presentation.

#### 4. Results

Folklorist Kenneth Goldstein (1974) asserts that field research in the social sciences must document the occurrence of phenomena under investigation in its "natural context," the form it would normally take as an element of daily life in the absence of observation. Realizing that the act of observation inevitably changes the nature of the phenomenon being observed, Goldstein often resorted to "induced natural context." For example, he pretended to be writing letters and inattentive to a performance he had instigated and whose every nuance he recorded in his "letters." Short of going into "deep cover" "actually joining a community for the purpose of secretly gathering information (Edbrook, 1961), there are three roles suggested by Toelken's performer-audience relationships available to researchers: the Outsider who is not privileged to know, the Bystander who may watch, but does not completely understand, and the Insider who though not being a full-fledged member of the group has access to native knowledge. Researchers are not necessarily stuck in any of these roles; social relationships are dynamic over time. Toelken does not advocate an evolutionary process; one may enter into a relationship with informants based on any of the roles. Obviously, an experienced martial artist may have opportunities to establish more intimate relationships with informants than one who does not hold "common ground" with the target group. An Outsider does not connect at the desired level with the target group by virtue of any number of factors ranging from personal to socio-political. Factors may be antagonistic as illustrated by research among African-American cultural nationalists in the US or benign as illustrated by research on vernacular martial arts in China in the wake of the ICH movement. The Bystander is allowed limited access after rites of passage, which may be highly structured, as was the case with observing Meihuaquan which was preceded by a ritual cleansing and paying homage to the ancestors of the art. Or, simply the demonstration of wanting to know enough to take a physical and/or psychological beating. In this role one learns the correct questions to ask and how to ask them. For example, when a statement to my Africanist informant that I would like to *see* Jailhouse Rock resulted in a beating, I learned that I should say I would like to be *taught* this vernacular martial art (VMA). To the Insider, knowledge flows freely via participant-observation. One is assimilated into one sphere of the life of the group, but remains fundamentally outside the community by virtue of his or her professional identity. More recently Wacquant (2003) gives us the role of observant participant, an intensified version of the Insider. The experiences of intentionally or inadvertently taking each of these roles during martial arts research provide the data to argue that each requires the researcher to balance transparency with resource persons against efficacy in collecting data. Each role has its own particular strengths and weaknesses

#### 5. Discussion

This brings with it ethical dilemmas. Announcing one's intent at the outset of research creates risks of distorting the evidence. At the other extreme, adopting a form of deep cover followed by asking informants to inspect and assess any material gathered and conclusions drawn after fieldwork runs the risk of fracturing rapport with resource persons—either during fieldwork, if discovered, or after completion of the project. In either case, subsequent opportunities among members of the target group become impossible.

#### 6. Conclusion

Further consideration (using case studies perhaps) of the roles open to researchers in the field, whether self-ascribed or imposed by informants, can facilitate the data gathering process. Moreover, while it is clear that we must all address the issue of transparency vs. efficiency, most often decisions are made on a case by case basis by the researcher, an institutional review board, or an editor. Each of these categories of referees are likely to be too close to the subject (the investigator) or too far (institutional review boards). I suggest that there is a middle ground. It may be time to develop a general set of guidelines to help us keep faith with informants and accomplish our academic goals of accurately depicting the martial cultures with which we engage. In short, we should consider policing ourselves.

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