

SELF-REFLEXIVITY ON RESEARCHING DIFFICULT TOPICS: LESSONS LEARNED FROM INTERVIEWING FORMER MEMBERS OF ORGANISED CRIME IN MEXICO*

AUTORREFLEXIÓN SOBRE LA INVESTIGACIÓN DE TEMAS DIFÍCILES: LECCIONES APRENDIDAS DESPUÉS DE ENTREVISTAR A EXMIEMBROS DEL CRIMEN ORGANIZADO EN MÉXICO

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Increasing attention has been paid to the emotional effects that conducting research on difficult topics can have on researchers, yet, the literature documenting successful strategies, and more crucially, the lessons learned from researchers working on these topics is still scarce. This paper aims to narrow this gap by sharing the author's self-reflexivity exercise about her process of researching drug trafficking violence in Mexico. The article discusses her methodological approach, describes her fieldwork experience, addresses the emotional challenges that she experienced, in particular during the transcription process, and shares the lessons learned during this process.

Keywords: researchers' emotions, research on difficult topics, life story interviews with offenders, Mexico, drug trafficking violence

Recientemente las ciencias sociales han prestado más atención al impacto emocional que causa a los investigadores el estudio de temas difíciles. Sin embargo, todavía hay poca literatura que documente las estrategias exitosas y lecciones aprendidas por los estudiosos de estos temas durante el proceso de investigación. Este artículo busca contribuir a reducir este vacío compartiendo el ejercicio de reflexión de la autora, cuyo objeto de estudio es la violencia generada por el narcotráfico en México. Se detalla su enfoque metodológico y, particularmente, los retos y emocionales que la investigadora experimentó, sobretodo durante el proceso de transcripción de entrevistas; además, comparte algunas de las lecciones que aprendió durante dicho proceso.

Palabras clave: emociones de los investigadores, investigación sobre temas difíciles, historias de vida de victimarios, México, violencia del narcotráfico

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INTRODUCTION

In the last decade increasing attention has been paid to the emotional effects that conducting research on sensitive topics can have on researchers (Theidon, 2014; Clark, 2016; Baird, 2018; Simovska et al., 2017; Sampson, 2019). Yet, the literature documenting successful strategies, and more importantly, the lessons learned from researchers working on topics related to violence is still scarce. As Clark (2016) suggests, we rarely “hear about how fieldwork affects researchers [specifically], and this is an important gap within [the] social science literature that needs to be filled” (p. 432). There are, however, valuable exceptions. Recent publications document academics’ experiences of researching challenging, difficult or sensitive topics (Silverio et al., 2022) and highlight the importance of acknowledging research related trauma (San Roman Pineda et al., 2022). The latter rightly points out the fact that researchers’ emotions have a significant impact on the knowledge production process, and by acknowledging and detailing such process, qualitative researchers can provide a more accurate and transparent account of their methodological and analytical choices.

San Roman Pineda et al. (2022) also point out that researchers’ reluctance to document their emotions during research, is linked to the positivist view and informed by a “masculinist rationality in research [that] implies that researchers mask their emotions and trauma-related experiences due to the fear of being stigmatised as someone unable to cope with the ‘objective and emotionless’ world of research practice” (p. 1185). Silverio et al. (2022) also challenge the misleading interpretation that qualitative research, and particularly the methodological tool of self-reflexivity, is “unscientific, without rigour or fundamentally biased” (p. 1). That is, when we talk about “emotions” in research we are inherently invoking the classic epistemological debate between positivists and interpretivists about what counts as scientific knowledge. It is beyond the scope of this article to address this debate, but it is worth noting that the self-reflexive exercise in this study should be understood in the light of the constructivist/interpretivist paradigm.

Silverio et al. (2022) provide a useful conceptual framework, which informs this article. In order to be more precise about the nature of the myriad of topics we investigate, they suggest differentiating between “sensitive”, “challenging” and “difficult” areas of empirical inquiry. By sensitive topics they refer to research delving into “the acutely personal about someone, or that someone experiences” (p. 2), for example studies on sexuality, mental health, and bereavement. Challenging topics encompass “research conducted within high-secure settings” (p. 4), for instance, studies on medical negligence or researching abuses within the social care system. Finally, difficult topics include investigation on extremely controversial topics such as “infanticide, sexual abuse, and research examining sexual behaviour” (p. 6). In addition, difficult areas of research may include those where participants share highly unethical, immoral and/or illegal views or highly reprehensive actions such as child abuse. In the case of my research, given the nature of participants’ narratives of violent crimes, such as torture and kidnapping, I identify it as a difficult topic.

This paper aims to join current discussions about researcher’s wellbeing by sharing a reflexive exercise on my research process of investigating drug trafficking violence in

Mexico, and in doing so, it aims to contribute to the creation of “a culture of sharing and transparency” about the challenges faced after fieldwork (Kiyimba & O’Reilly, 2016, p. 473), and help future generations of scholars who would like to embark on researching similar topics. Furthermore, the article aims to highlight the relevance of accepting researchers’ emotions as a crucial element of the research process, and directly challenges “the dominance of the Western philosophical tradition that judges emotions to be the anathema to academic research” (Dickson-Swift et al., 2009, p. 62).

The article starts by explaining the context in which field research was conducted and the methods I used to collect data. Next, it offers some insights regarding the successes and challenges faced before, during and after fieldwork. A final reflection is then made about the lessons I learned and that could potentially be beneficial for qualitative researchers studying difficult topics.

RESEARCH CONTEXT AND METHODOLOGY

Since the declaration of the “war on drugs” in 2006 by former president Felipe Calderón (2006-2012), violence skyrocketed in Mexico. Homicides increased from a low rate of 7.8 homicides per 100 thousand population in 2007 to a rate of 22.6 in 2012, constituting a three-fold increase during this time period (United Nations Office on Drugs and Crime [UNODC], 2013). In 2013, At the start of my PhD studies, homicides, disappearances, kidnappings and gruesome displays of violence continued to be pervasive across the country under the administration of the newly elected candidate, Enrique Peña Nieto (2012-2018). Despite Peña Nieto’s efforts, the strategies to tackle drug trafficking violence were not working; in fact, during his administration homicide rates reached an all-time high in 2017 (Calderon et al., 2018). In this context, and drawing on my master’s dissertation’s findings, I learned that one of the factors contributing to the failure to mitigate violence in Mexico was that the government’s strategy had overlooked the perspective of offenders in policy responses. This is why I decided study drug trafficking violence from the offenders’ perspective.

Understanding Drug Trafficking Violence: A Grounded Approach

In order to have a better understanding of drug trafficking violence in Mexico, I conducted four months of field research in a Northern state in Mexico, from October 2014 to January 2015. For safety reasons, I chose to conduct fieldwork in a religious drug and alcohol rehabilitation centre which I was familiarised with, as it was established in my hometown.

Following the principles of grounded theory (see Strauss and Corbin, 1998, p. xiii; Charmaz, 2014), my research drew upon an inductive methodology in order to let participants direct the course of the study. As opposed to a deductive research approach, which would indirectly impose some of my ideas and concerns on participants, I did not have a hypothesis or preconceived ideas on research subjects. Instead, drawing on the flexible, yet rigorous, grounded theory approach, fieldwork for the research was designed to follow three stages. The first stage entailed familiarisation with the rehabilitation centre, gatekeepers, and potential participants. During the second stage of fieldwork, once a broad research question had been identified, I conducted thirty-three life story interviews with men who identified as

former participants of organised crime. Twenty participants self-identified as dealers. This job entailed selling drugs in the streets or in hidden shops called *tienditas* 'little shops'. In addition, dealers were also in charge of other dealers, which implied engagement in violent activities such as corporal punishments for dealers who stole merchandise or money. Nine participants self-identified as hitmen. This meant that their main job in the drug trafficking industry was murdering individuals as directed by their bosses. Two participants identified their main job as migrant smugglers, known in Spanish as *coyotes*. Their main job was to smuggle people and drugs into the United States. In addition, once in the U.S.A., their job was to distribute drugs among the cartel's American partners. Finally, one participant identified himself as a chauffeur and another as a *escolta* 'bodyguard'. The main job of the former was to transport drugs within Mexican territory. For the latter's main task was to be the bodyguard of a *comandante* 'major' of the cartel.¹

Finally, in the third stage, I conducted two focus group discussions in order to complement and triangulate the information from the individual life stories. Afterwards, I proceeded to analyse and organise all data collected in the previous months. Crucially, I also observed a rigorous exercise of self-reflexivity throughout the whole research process. By 'self-reflexivity', I mean the systematic exercise of reflecting on the conditions in which I collected and analysed my data. As a methodological tool, this exercise aims to provide the readers with personal reflections and background information which would allow them to assess how, and to what extent, such contextual factors played a role in the research and knowledge production processes.

SUCCESSFUL DECISIONS, CHALLENGES, AND AREAS FOR IMPROVEMENT

The Importance of Choosing the Right Method for Minimising Emotional Risks for Both Participants and Researchers

I chose life story interviews as a method to collect data because it proved to be the most adequate to address such a difficult topic. Life story interviews, sometimes referred to interchangeably as life history interviews, is a qualitative method that focuses on generating data through interviewing a person about his or her entire life (Atkinson, 2001). The life story method minimised emotional harm to participants in three ways. As a starting point, participants were already familiar in sharing a condensed version of their life stories to the general public in order to show how their life changed after drug rehabilitation. When they spoke for the first time for this research, they narrated their experiences as a life story.

Second, given the difficult nature of the research subject, i.e., discussing participants' engagement in serious crimes such as drug trafficking, torture, kidnapping and murder, it would have been insensitive, and counterproductive, to ask participants to narrate their experiences of drug trafficking violence directly. However, through the life story method, this potential discomfort was minimised since participants were given the opportunity to provide context to their narratives in an organic manner, as the interviews started by talking about their childhood, and I focused on questions about participants' everyday lives, such as: what do you remember the most about your childhood? Did you use to celebrate your

¹ For more detailed information about participants, see Garcia Reyes (2018).

birthdays? Who used to take you to school? What did you have for lunch? What did you do in your free time? This, in turn, allowed me and the participants to establish a good rapport before touching upon other difficult topics such as their involvement in criminal activities. Participants were in fact visibly more relaxed as the interview progressed. The fact that the topic of participants' involvement in drug trafficking was not addressed until the latter half of the interview ensured they felt more relaxed in sharing their experiences.

Crucially, life story interviews provided participants with a degree of emotional relief, but more significantly, offered them the opportunity to talk about their lives without being judged or labelled. Indeed, contrary to the cultural norm that prevents men from crying, most participants cried during the interviews. In this regard, as the psychologist-psychotherapist Senjak points out, the fact that interviewees cry during the interviews is not a dreadful thing as "they need to touch the feelings they had when the trauma happened. When they touch those feelings again, they gain control of them, and this is an important part of the healing process" (Senjak, cited in Clark, 2016, p. 432). That said, I acknowledge that, despite the fact that interviews provided some catharsis to participants, this does not mean that our conversations had a therapeutic purpose, and this was made clear to both participants and gatekeepers.

By giving participants the opportunity to share their life stories, they narrated key experiences related to other important identities in their lives such as loving sons, caring parents, drug addicts or, sadly, even abused children. These narratives would have been missed if the sole focus were to collect qualitative data through closed item surveys. When I spoke to participants for the first time, I understood how valuable their background stories were. This is how I initially learned about their experiences of domestic violence and gang violence, so it became clear to me that in order to have a better grasp of how participants understood their involvement in practices of drug trafficking violence; it was necessary to include the background knowledge that informed the way they understood the world in general as a central component of my analysis. These experiences were key in unpacking participants' understanding of the world, and therefore, helped shed light on their engagement in drug trafficking violence. Finally, as a researcher, I benefitted from this type of interview as I was able to humanise research participants. By learning in depth about their lives, I was able to bond with them more easily.

The Relevance of the Transcription Process for Minimising Emotional Impact on Researchers

Most of the literature, and the ethics committees particularly, place special emphasis on minimising emotional risks during fieldwork (Clark, 2016). This period, however, is only one stage of our work. Those who conduct interviews and use other qualitative approaches, know that the period after fieldwork often has a significant impact on the researcher. However, the emotional impact of such period, such as the transcription process, has been rarely addressed in the qualitative methods literature. As Kiyimba and O'Reilly (2016) point out, the invisibility of the emotional impact of transcribing material on sensitive or violent topics "increases the potential for emotional harm and possibility vicarious traumatization, which has generally been unaddressed as an issue in qualitative research" (p. 473). I certainly would have benefited from knowing this during my PhD studies.

Before fieldwork, I was aware of the potential emotional risks of my research. However, ethical guidelines of conducting research with vulnerable populations dictate researchers should avoid expressing emotion, as this can be misconstrued as judgement of the events and issues that participants narrate, all of which has the potential to bias the information that participants may disclose (Graham et al., 2013). I did not experience emotional distress, depression or anguish while conducting interviews. In retrospect, avoiding emotional impact was possible mainly because the focus was not on the content of the interviews, but rather on the practical aspects associated to them. First, there was concern about scheduling the interviews with gatekeepers. This took a lot of energy and, unconsciously, allowed me to detach from the tragic lives and gruesome details that participants shared. Second, prior to the interviews, my attention was cantered on preparing equipment to record the interviews. Third, during the interviews, I was more focused on participants' emotional wellbeing. Perhaps because attention was focused on making sure participants were comfortable and emotionally safe, there was no time or energy to dwell on my own emotions.

It was not until I commenced the transcription process that interviews took an emotional toll. The conditions in which I undertook this task were not the most favourable. I wanted to finish the transcriptions as soon as possible, therefore time was exclusively dedicated to this task, and even decided to work from home to avoid any distractions. Transcribing word by word meant that it took almost a week to transcribe each interview, as most of them were at least an hour long. Although I had listened to the interviews before the transcriptions, the conditions for starting the transcription process were quite different. Within a brief period of starting the transcriptions, I began to feel emotionally disturbed.

This time, without the pressure of making notes, recording interviews properly or making sure that participants were comfortable, I was able to gain a fuller grasp of how challenging and tragic their lives were. It became indeed difficult, and often painful, to listen to their traumatic childhood stories and impossible to fully detach from the subject matter. Most participants were physically abused and had to resort to begging in the streets. Severe beatings by parents were common in their narratives; other participants were simply abandoned on the streets by parents who could not or would not care for them. The majority of participants also revealed strong resentments towards their fathers because of the daily violence they exerted on their mothers. These life experiences mean that participants still suffer when they recall their childhood memories. When transcribing these stories, participants would often cry, which would prompt a similar reaction in me.

"Issue" of Being a Local

Finally, the myriad of emotions I experienced during and after fieldwork include feelings of guilt and depression, not only in terms of my position of privilege, but also in terms of being more aware of the several everyday abuses and atrocities that take place in my country. Most of the literature in English addresses the emotional issues that Western researchers suffer when studying difficult topics in the mistakenly labelled "Global South." In my case, being from Mexico posed an additional layer to consider in the exploration of gruesome crimes linked to drug trafficking.

I often had feelings of guilt for residing abroad and embarking on postgraduate studies. Reading news about disappearances and events surrounding this topic in Mexico, often triggered these feelings, which made advancing academic work difficult. On reflection, perhaps what caused greatest distress is that my research subject matter — drug trafficking violence— was not only a problem at the time but continues to be a central problem today. Therefore, there were some points in which I wondered if it would have been more impactful or productive for me to return to Mexico to work in other sectors, as civil servant, or non-governmental organizations (NGO) employee, instead of pursuing an academic career.

FINAL REFLECTION

Every research process is obviously unique and would be influenced by the subjective experiences and positionality of researchers. That said, I strongly believe that qualitative researchers can benefit from learning about the challenges that other colleagues doing similar investigations had faced. With this objective in mind, I share four lessons I have learned during my research journey. First, conducting life story interviews to address a difficult topic. As discussed above, when doing research on difficult topics and, in particular, when interviewing criminals, it is of paramount importance to choose the most adequate method of data collection. In my case, conducting life story interviews was certainly one of the best decisions I made in my research process for three reasons: a) I was able to collect more fine-grained data, and background context that proved extremely valuable during the analysis stage; b) I was able to bond with participants in an organic way and; c) I was also able to humanise participants by giving them the opportunity to provide more context to their stories and see them beyond their identities of former drug traffickers. Second, taking extra precautions and self-care during the transcription and analysis stages. Another important lesson I learned is that we should never rush the transcription and the data analysis process. It is well documented that constant exposure to gruesome narratives, or listening to participants crying on a regular basis, will eventually have an emotional impact on the researcher. Therefore, I suggest avoiding working on transcriptions or data analysis for more than four hours per day. Ideally, this should be done the first half of the day, and the second half should be dedicated to activities that allow the researchers to detach from the content they were exposed earlier, e.g., working on the theoretical framework. Something else I found useful was to avoid reading or watching any type of violent material, such as movies, series, and even the news. In addition to doing exercise on a regular basis, another good detaching strategy for me was to make sure that at the end of my working day I would read or watch something relaxing for me. This proved really valuable to overcome insomnia.

Third, asking for professional help and support from the University. I highly recommend researchers to look for the appropriate psychological support, even if they still do not feel they need it. In my case, I did not look for help until I was having several symptoms of vicarious trauma (in particular insomnia and depression), which, in hindsight, could have been minimised if I had the right support from the start of my research. For postgraduate students, it is really important that researchers speak to their supervisors on a regular basis,

or line managers in the case of established academics. In my case, as a PhD student, one of the main reasons why I felt so overwhelmed was because I had tight deadlines, and little support from the University. Again, in hindsight, some of the most difficult moments I had during my research could have been minimised if the University had provided me and my supervisors with the right support schemes. For example, by providing extensions that acknowledged that working on difficult topics entail longer periods for transcription and data analysis, and by providing financial support for counselling or clinical therapy.

Finally, being honest with yourself. A valuable lesson I learned about my feelings of guilt and anguish is that after a certain point I was being self-indulgent. There is a fine line between the feelings of anguish and guilt and just feeling sorry for yourself, thinking that the world does not understand you. After years of therapy, I learned that this is normal stage in the process of overcoming vicarious trauma, but obviously we have to move on from there. In my case this meant accepting my limits, such as stop studying gruesome crimes. The key in making this decision is that I made it, nobody imposed it on me. As opposed to the feelings of anger I felt when people from the University suggested that if my research was affecting me that much, I should have stopped doing it; when I realised that I reached a point of emotional saturation, and no matter what I did, I was still feeling extremely disturbed by my line of research, I felt relieved when I finally decided to stop reading and researching topics that at that point, I was not able to handle. It was a hard decision to make, but definitely the best for my emotional wellbeing. To be clear, I am not suggesting researchers should avoid or stop doing their research on difficult topics. What I am sharing here is that if there is a point in which, after exhausting all methods and support available, we still struggle to cope with our research topics, then we have to consider the option of stop doing what we are doing. This does not mean a clear-cut end, but rather a pause, so we give ourselves enough time to process our emotions and heal. This will not only be beneficial for researchers at a personal level, but a balanced wellbeing will also impact the quality of our research.

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