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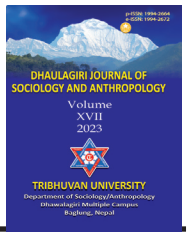

The Importance of Positionality for Qualitative Researchers

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Abstract

Qualitative researchers are required to be critically reflective and explain to readers their positionality on their work. This account can be relatively straightforward, but there are occasions when this process of reflection and outlining one's positionality is much more complicated. This method-paper explains this process. It outlines, using examples of different occasions and situations, where and why such complications may arise, for example, around values and personal experiences. It concludes with further practical advice on writing the section on positionality for novice social scientists.

Keywords: critical reflection, positionality, qualitative research, reflexivity, research methods, social sciences

Introduction

Critical reflection and positionality are key concepts in social science research. This positionality centers on the principles of researchers questioning and addressing assumptions about their place in the research process. This questioning ranges from the focus of the research question to the chosen population, the analysis, their philosophical approach, assumptions and world views, and even the dissemination process. Positionality is a reflection on the researcher's biography and pays "attention to the context that creates the researcher's identity, an identity that will affect the way that the social world is seen and understood" (Bukamal, 2022, p. 328). A reflexive approach refers to the researcher thinking about their own role in, and hence bias towards and influence on, the research in which they are engaged. As Wilson and colleagues (2022, p. 47) note: "reflexivity involves the researcher building on the recognized and clearly stated assumptions (i.e. identity and positionality), by questioning and addressing these assumptions using strategies pertaining to the research topic; the research design, context and process; and the research participants." Reflexivity "can range from a minimal awareness of one's own biases and subjectivities to a full-blown autobiographical frame for the research" (Banks, 2007, p.15).

This paper focuses on reflexivity and the consideration of one's potential biases. We highlight some key challenges around positionality for the researcher when it comes to both the need to and the challenges of, critically reflecting on each aspect of the research process and our biases and assumptions within the research. To set the scene, this paper starts with an example where positionality is not complex but fairly straightforward and highlights occasions where problems may arise. The further examples cover more complex issues, e.g., when divulging information about positionality is not desirable for the researcher and/or the participants or when the positionality is not clear cut, difficult to contextualize, and hence more difficult to describe in exact words.

When Positionality is Straightforward

Typically, sociologists and anthropologists should reflect on their own epistemological and ontological positions to determine how 'who they are' may/could have affected their data collection and analysis, including the response of research participants, i.e. those being observed

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or interviewed. Since the researcher is an integral part of qualitative research processes, it is important to know the position taken by the researcher (Savin-Baden & Major, 2013). Positionality refers to how the researcher makes sense of the issue, in relation to the study participants, the research design, context and process (Holmes, 2020). Box 1 provides illustrative text from a qualitative paper on breastfeeding in which the authors outline their professional backgrounds. The first author is a midwife, which is obviously an important element in breastfeeding research (Taylor et al., 2020), the professional backgrounds of her three co-authors were in pharmacy, midwifery, and sociology.

Box 1

Example of typical section on positionality in a qualitative paper (Taylor et al., 2020, p. 3)

> Reflexivity also meant that when coding, analyzing, and interpreting the data, the first author was more mindful that her interpretations might have been influenced or biased by her own personal and professional background as a midwife and mother…Thus, all members of the research team aimed for 'empathic neutrality' by being open, sensitive, and respectful in their approach to the analysis…. The credibility of the analysis was also enhanced by the different interprofessional perspectives of the co-authors who sampled the video clips to check that the first author's initial interpretations were accurately captured...

What the text in Box 1 conveys to the reader is a clear message about how the researcher reflected on her own life as a mother and a midwife and how this may have influenced the research question, methods, data collection, and other processes, including its analyses and conclusions.

The following section, using examples, focuses on when such reflection covers a range of issues that make describing one's positionality more complicated.

Challenging Biases and Assumptions: When you can't Divulge

Since taking a critically reflective approach is important throughout the research process (van Teijlingen et al., 2022), Ph.D. examiners as well as journal editors and reviewers, expect a section on this in a qualitative paper. Providing clear insights into one's positionality, reflecting upon their own biases and assumptions and being transparent about this, fosters trust and allows stakeholders and other researchers to better contextualize and increase the robustness of the research process and its outcomes, as the following examples show:

Example A: Research with the Opposite Gender

Subedi (2010), a male anthropologist scientist, conducted evaluation research on uterine prolapse (UP), a complex condition that is often kept secret because of the shame of the condition affecting a sensitive part of the woman's body. The reflection section in the paper adds: "although the objective of field visit was to conduct final evaluation of the mobile health camp projects …, the author, being an anthropologist, collected additional information regarding socio-cultural issues of UP and ethnography of mobile camp. These issues are pertinent but were beyond the scope of evaluation of the project (Subedi, 2010, p. 23).

The paper reports that many women fear condemnation from their communities and families and that no discussion surrounding the disease occurs openly within the family and in society.

Women who suffer from UP continue to remain silent about the matter. The women, who know the place of treatment and have the means to access it, hesitate due to fear of divorce or abandonment, isolation, shame, and sensitivity surrounding genital issues. Many women in rural villages live with such problems for more than 30-40 years. They cannot talk about their problems to doctors, but just say they have pain in lower abdomen and turn their heads down. If a doctor is not experienced, they would not be able to diagnose the real problem. (Subedi, 2010, p. 37).

Transparency about bias, such as a male lens upon research about women's health, becomes significant but maybe more so about their curiosity within this field and therefore seeking additional information from participants or fellow researchers. For example, being aware and reflecting on the fact that a male perspective, when researching a female issue, may impact the questions that are asked and even the focus of the research. By considering their male lens, the researcher may be reflective in the need to discover whether a female researcher might approach this differently. This is not to say their perspective is wrong, it is just one view.

Example B: Positionality can be Messy

As Wilson et al., (2022) noted, researchers need to consider how their identity might impact the behaviour of the participants, and this is particularly relevant when considering interviews and interpreting data from the field observations. For example, one of the female authors, conducted research with men who used Anabolic Androgenic Steroids (AAS) using online interviews (Harvey et al., 2024). In this case, it was particularly important to consider the influence the gender of the researcher may have on the data collected as they were mainly male participants using AAS who often have a strong masculine identity (Kanayama et al., 2006). It is important to be aware that one side effect and potential benefit of AAS use is the impact on libido (Armstrong, et al., 2018) and male interviewees might be reluctant to discuss such issues with a female interviewer. On the other hand, as the interviews were confidential, participants may have seen them as a safe space to share their views, as potentially there was less social pressure on them to maintain a certain persona. This leads on to another key

consideration: insider versus outsider, which we will discuss later. Furthermore, when it comes to the data analysis, as a feminist the researcher needed to critically reflect on how this lens impacted her view of masculinity, from both the perspective of the data collected at the interview and her perspective that the patriarchal nature of our society may have negatively impacted on men's view of themselves and their ability to seek or access support (Harvey et al., 2019), the topic of the research.

Another positionality lens is that of religion and the assumptions around it. As a person of faith, a researcher may want to reflect on this as a worldview through which they analyze their data. However, with assumptions around religion causing conflict in the current political climate, researchers may not want to disclose their Jewish faith and expose themselves and perhaps even their family to a potentially anti-Semitic response or their Muslim faith as they expect an Islamophobic response. There is also a risk of repercussions from within one's faith circles. For example, if a Hindu or Christian with pro-life views were to conduct research that included abortion. How much does a researcher need to disclose of their worldview in regard to bias, in respect of impartiality? If, for example, the researcher disagreed with the participants' worldview, would they be required to reflect on this, being quite personal, or would they not? And who would know the difference?

Being an Insider or an Outsider

A researcher is an 'insider' when they share key attributes with people in their study, and an 'outsider' when they are not part of the group/community they study (Braun & Clarke, 2013). Researchers note that their positionality within the culture, i.e. being an insider, is an advantage (Underwood, 2022), and that having privileged access to a community in which you have had time to already have built relationships can enable participants to be open and honest in a perceived 'safe' environment (Johnson & Richert, 2016). Therefore, not being part of the bodybuilding community was another consideration as participants might be less inclined to talk and more inclined to downplay of side-effects – and again, this impacts the data collection and analysis. However, Monaghan (2002) supporting the fundamental tenets of their drug subculture, and as part of the underlying negotiation of self-identity, respondents espoused 3 main justifications for their own and/or other bodybuilders' illicit steroid use: One suggested that if you are part of the same culture as the participants you could run the risk that they may make assumptions about your knowledge. As an outsider, this was not a consideration. However, the researcher was concerned about personal credibility within this community, and therefore, being aware of this position was able to adapt their interview style to take advantage of this position.

There are other types of 'insider' or 'outsider' than just being part of a culture, where you may even have a 'foot in both camps'. Three of the authors are also practising social workers, and this was something they all have to consider, the role of being a practitioner and a researcher simultaneously. It is partly about where the boundaries lie between being a practitioner and a researcher, as their value set from social work may challenge certain research approaches and vice versa. The following examples seek to illustrate the challenges faced and relevant considerations.

Whilst researching a sensitive topic around substance use (see example B), there was a challenge in the clash of perspectives between 'the researcher'; purely curious and objective, and 'the social worker'; with the need to want to offer support and solutions. This was particularly evident in one interview, where a participant seemed very conflicted in his use. At the end of the interview, she felt compelled to explore support options with him. This was her social worker persona coming into play, and her tendency towards being 'a rescuer' (de Vries, 2013). It is important for researchers who are also practitioners to ask themselves the question 'Which hat am I wearing today?' as Ryan et al., (2011) reminded midwives doing their Ph.D. whilst working in maternity services. Reflecting on this raised the researcher's awareness for future interviews and enabled her to better retain her researcher focus, manage her professional bias and assumptions, and therefore improve her interview technique and not impact the data collection.

A further example of this highlights how difficult it is for practitioners to sit squarely in the role of researcher. One of the research team has worked extensively with families experiencing family violence and abuse, and this will impact upon the understandings and interpretations made in the research. This bias will be present in the way the information is interpreted due to personal preconceived notions and professional contributing factors such as the experience of working within Children's Social Care in the UK. It is understood that when research is based within their own family, community, or place of work, the influences, both social and cultural (including work culture), will shape the research more so than if a researcher as an outsider, as someone who is unfamiliar with the research or participants (Chavez, 2008). In this example, the researcher is an insider-researcher because of her practice experience. The influence upon the researcher's perceptions of the participants would have been based upon prior practice, and the participants' positioning towards the researcher would have been based upon their prior experiences or knowledge of researchers and social workers, both positive and/or negative. An example is when the researcher declared that they were both a researcher and a social worker. The reason for doing this was they felt it was important to be transparent because of the prominent negative views of social workers in UK society, so they had a choice about whether to engage in this project. This also helped hold her to account in regard to sustaining a reflective stance on her

professional experiences, influencing her thinking about the participant's experiences (Oliver, 2019).

There were times during the interviews when it was hard not to step in and offer advice and guidance to the participant, as she would do if acting within her professional capacity. She was also aware that it would be challenging to put aside her professional knowledge and understanding within this research and the interpretation process. This is why the method chosen was one which, for the first interview with each participant, asked one main research question 'tell me the story of your life' and then remained silent through the interview, and at the end of the main interview, any follow-up questions, she used their words to shape the questions, therefore reducing the bias seeping into the interviews from the researcher to the participants. Interpretation of the information gathered was done with reflecting teams, again reducing the bias within the research (Wengraf, 2001).

Being an 'insider' can also mean having had lived experience of the topic under scrutiny. The position of a researcher with lived experience can often enhance the research (Mellifont, 2023), especially in terms of being able to relate to participants as an insider researcher. Having had similar experiences helps the researcher to ask interviewees the 'right' questions and ask these in an appropriate way. This will help build rapport as it is more likely to make someone comfortable to share. However, some lived experience is not necessarily shareable. In the example of child-to-parent violence and abuse, there is often a delay in reporting (Oliver, 2019), and the processes can take months, years, or even decades to make the situation safe for those involved. For someone who has experienced this form of abuse to be researching, they may jeopardize ongoing court processes or police investigation if they discuss it too widely by disclosing their bias. There is also the social stigma surrounding this form of abuse (Clarke et al., 2017) and how this may impact the family if this were published. Even with data being anonymized and pseudonyms being used, if the researcher reports a specific scenario (for example, my brother shot my uncle in our family home) the situation and the persons involved, may be identified and could have repercussions for the family, particularly with the author's name being attached to that piece of research.

There is also the consideration if children are involved, what long-term emotional and social impact this could have on them. We see the media report on court cases and criminal activity and can see the impact this has on the perpetrator's families (Pollak & Kubrin, (2007). Would this be a necessary research activity, or would it instead cause more harm than the research is trying to alleviate? In professional circles, there has been a recent move towards consideration of children reading about themselves when they grow up (such as in the case of Ms D v Mr D 2022 EWFC 164). Would it be right for the researcher also to consider the impact on the children of their parent(s) being discussed in the research?

What If You Can't Divulge?

What happens if the researchers cannot, or will not, be able to openly explain their positionality in any detail? This could be about the researcher's personal experience, such as something that could feel risky or has the potential to discredit or shame the individual, their family, friends, or their local community. These experiences might even be illegal or include immoral activities such as substance misuse, sexual deviance, violence, fraud, or domestic violence and abuse (DVA). We can easily envisage that some social science research in criminology could involve the researcher participating in illegal activities, especially during undercover fieldwork where the researcher would need to fit in to act as a non-participant observer. For example, a social scientist involved in the study of black-market activities or pilfering may not want to offer too much detail about their own involvement in this illegal activity for fear of attracting police attention or prejudicing an ongoing court case. Another example would be doing fieldwork or research covertly in a country without a work permit whilst on a tourist visa, as this is something you may not want to advertise too much.

A further challenge could be related to the context, cultural experiences, expectations, and even morality of the researcher. Ensuring that you consider how your own cultural values and beliefs might impact the research is also important. For example, a researcher born in Nepal working on a UK project investigating DVA, might have different biases and a different understanding of how participants might engage with such a subject compared to a UK researcher (and vice versa) as such abuse often remains undisclosed in Nepal due to power dynamics and cultural expectations within marriage and prevailing patriarchal structure (Sapkota et al., 2024). This difference might inhibit victims from publicly disclosing their experiences, whereas in the UK, although there is still stigma related to DVA, people are starting to speak out, and so a researcher might have to change their method/approach to data collection. Moreover, if the researcher has not fully reflected on their own biases as to why participants may not engage, or may give limited responses in interview, their interpretation for the reasons for this might be limited/impacted. Taking a critically reflective position is not as easy as is suggested, Dewey (1910) noted more than a century ago that the process of critical reflection is uncomfortable, yet Mezirow (1997) suggested that new learning comes from a 'disorienting dilemma', and being critically reflective is a way to both uncover and explore such dilemmas.

One can easily see how reflecting on the research and bringing biases out in the open, may offer greater insights into the research. However, if by doing so, they have to expose potentially uncomfortable truths, it may adversely

impact the researcher's relationship with friends and family, employer or colleagues and may even hinder their career, as the following two examples highlight:

Fear of Disclosure: Social Stratification in South Asia

A social science researcher doing research into adoption (officially or unofficially) may not want the wider world to know their caste. The study of caste in Nepal often reveals stark differences in perspective based on one's caste position. For Brahmin, a privileged position within the caste hierarchy, the experience of caste manifests as a system of social order, tradition, and perhaps even prestige. Their vantage point carries inherent biases; it might devalue or ignore the systemic discrimination faced by Dalits. On the other hand, for someone from a Dalit background, the lens through which they perceive caste is marked by a generation of marginalization, oppression, and restricted access to resources and opportunities, bringing with it another set of biases. The same activity or event may evoke vastly different reactions and interpretations based on these positionalities. While the Brahmin might see tradition and stability, the Dalits are more likely to perceive barriers and injustice embedded within the caste system (Subedi, 2013). Therefore, it would be important for a researcher to openly acknowledge their potential bias. Still, considering the stigma and challenges, this raises the question of how a researcher might reflect honestly on their positionality if it is to be written in a thesis that then enters the academic/public arena and can be accessed by colleagues.

This further example highlights a more social and culturally sensitive challenge.

Society in Nepal is quite conservative and is not very supportive of any sexual orientation other than heterosexuality (Regmi et al., 2019). It is fair to say that in Nepali culture, it is not yet acceptable to talk about sex and sexuality for the older generation, and even more so for transgender people. Regmi et al. (2019) reminded us that transgender individuals in Nepal are often stigmatized or discriminated against while accessing health and social care services. A transgender researcher doing research into transgender issues in Kathmandu may not want to advertise their own sexuality for fear of the reaction of family in their village at home. Their reflections on researching the transgender community in Kathmandu might be more 'muted' or self-censored when reflecting on positionality in their work than a researcher of a similar gender background doing similar social science research in Amsterdam or New York. Hence, their possible biases are less clear to the readers of their research outputs.

Reporting Positionality

Based on our combined research experiences and the academic texts we have cited, Box 2 offers some advice on positionality in writing.

Box 2

Advice for Presnting Positionality

- Positionality is multifaceted and dynamic. It is important to be open and to explore and understand alternative viewpoints, even if they challenge researchers' assumptions and beliefs.
- Positionality refers to both the researcher's view of the world AND their position during all aspects of the research process.
- Start thinking early on about positionality in the research. The social, cultural, political, and personal positioning of the researchers plays a vital role in positionality. It also includes ethnic and gender backgrounds, beliefs, biases, and experiences that influence perspective and interpretation of data. It is important to reflect on how researchers' positionality shapes the research question, methodology, data collection, analysis, interpretation, and dissemination.
- Be reflective throughout the planning and conducting of your qualitative study. It is not a task to be completed at the end when writing up. Borrowing for Bourke, (2014, p.1) "Research continues as we reflect", in other words reflection is not a final product of the research, it is an integral part of the process. Reflecting throughout generates better research.
- Keep a reflective diary during the research project.
- We advise researcher-practitioners to take a step back prior to the start of the study to reflect on their positions (plural) as researchers AND as practitioners.
- It is important to describe the background, including identity, social location, cultural influences, and relevant experiences in the research and how these factors might have influenced the research process and findings.
- Presenting your critically reflective position is often not easy. Therefore, try a few draft versions before you share with supervisors or colleagues.
- Don't discount yourself from research due to concern around reflexion. Have a discussion early on with your supervisors, as a broad range of research strengthens practice and supports society as a whole to continue to move forward.
- Write down everything you think affected your work, even the things you can't tell others, once you have covered everything, start editing out the things you cannot tell, by using different example, changing minor details or facts, using pseudonyms, etc.
- Stay open to feedback, engage in critical self-reflection.
- Finally, don't reflect on anything and everything, focus on those elements relevant to your research project in particular.

Final Thoughts

Critical reflection can support researchers to review their analysis with a more objective lens; having data analyzed separately by colleagues, who perhaps have

different lenses, can also help to add a further level of objectivity to a subjective process providing they are also aware of their own biases, feelings, and experiences. Qualitative research is an embodied experience and may affect the researcher (Dickson-Swift et al., 2009), which in turn could affect the way the data is interpreted. For example, one author shared that they felt empathy for the stigma faced by their participants – how, then, might this have affected the analysis of the data? The researchers' values may also be impacted, for example, the need to be honest and authentic, and therefore finding a balance between sharing the participants' stories, honestly, yet being objective and non-judgemental, through honoring their participation, whilst still raising challenging themes that may infer a stigma to the population or be at odds with how the population sees themselves as participant views are biased and subjective.

If you conduct research in the field you are working as a practitioner, or have worked extensively before becoming a researcher, the line between researcher and practitioner can be very fine, therefore affecting positionality, which can impact both the researcher and participants.

Declarations

Ethical Approval and Consent to Participate:
Not applicable

Competing Interests:
There is no competing interest with any individual or agency.

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