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Qualitative Conundrums Episode 1: Saturation with Victoria Clarke

Speaker information

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- 00:00:10 Sohail Hi. I'm Sohail Jannesari, a migration researcher and activist. I'm here to welcome you to Qualitative Applied Health Research Centre's podcast series called *Qualitative Conundrums*. Qualitative research always brings up a lot of questions for researchers. "How many people should I talk to? How should I interpret what they say? Do themes emerge or are they actively created?" At the Qualitative Applied Health Research Centre, mercifully shortened to QUAHRC, we aim to make space for these debates. And this series is all about tackling fundamental qualitative conundrums. We will speak to esteemed academics who will offer their expert opinions on how you can solve the questions that plague your qualitative research. Today we have with us Associate Professor Victoria Clarke from the University of the West of England. Victoria, would you like to introduce yourself?
- 00:01:11 Victoria Hi. So as you know, I'm Victoria. I am a lecturer at the University of the West of England, where I mainly teach about qualitative research methods. If you've heard my name before, it's probably in association with Virginia Braun. Although it's spelled Braun, it's pronounced Brown. And we have written an awful lot about thematic analysis, but also qualitative methods more broadly. And we've also specifically written about saturation in the context of thematic analysis, which is obviously what we're going to be talking about today.
- 00:01:46 Sohail Great, thank you and very much appreciated that you clarified how to say Brown.
- 00:01:51 Victoria Yeah. [chuckles]
- 00:01:52 Sohail Because I've always been saying Braun.
- 00:01:54 Victoria Oh, I still prefer Braun. Everyone who knows her calls her Braun. [chuckles]
- 00:01:58 Sohail Well, maybe this podcast will be the vehicle for change. [chuckles] So I'd like to start by asking you what is kind of a loaded question. And it should be an easy one to answer, but I know that it's actually very nuanced. So, what is data saturation?
- 00:02:16 Victoria I think the best way to understand the concept is to look at its history. And where it came from is the concept of theoretical saturation in grounded theory. And theoretical saturation in grounded theory had quite a particular meaning to do with understanding all the different facets of a phenomena, of a concept or an idea in order to develop a theory about it. And you achieve theoretical saturation in—through a process of theoretical sampling. So you are identifying cases, you're identifying participants that will help you understand the phenomena, the concept, the idea that you are interested in. So you are—you have this kind of dual process going on of seeking saturation and seeking saturation by generating information in a very particular way. So it has this quite specific meaning, and there's been lots of discussion within grounded theory about whether saturation as a concept, as a term is helpful. And I quite like Ian Dey the grounded theorist's description of it as an unfortunate metaphor, because it implies kind of knowing it all or reaching some kind of endpoint. So that's where the idea of data saturation comes from. It kind of evolved from this very specific iteration of the concept. The specific meaning, the place within a research design where you're doing these other things, all kind of disappear and it becomes this generic concept and it catches the idea of there being no new information in your data. So where you achieve saturation when doing further data collection, speaking to more participants doesn't tell you anything—doesn't give you any more new information. How you judge that isn't always clear. It often seems to be based on researchers' impressions kind of during data collection. If they might not have done any kind of data analysis of it. But that's sort of what the concept means. And it's sort of lost its grounded theory history and become this much broader kind of generic concept. And it pops up everywhere in qualitative research. We see it in lots of kind of quality criteria. So the recent, or

relatively recent APA reporting standards and publishability kind of guidelines around qualitative research, which are very influential in my discipline of psychology, they reference saturation as a way of judging sample size. So it's sort of become this generic concept while at the same time there's a huge debate about it. It's a huge debate about its usefulness, how it can be achieved, the assumptions underlying it, and so on.

00:05:00 Sohail So, it's interesting that the history is in grounded theory. So, if someone is listening out and they're not doing grounded theory, can this idea of data saturation be useful?

00:05:15 Victoria For me, it depends on the theoretical assumptions that are shaping your research. Because saturation isn't a neutral idea. It isn't a sort of trans theoretical idea, although it's often treated like that. And it's often treated like the gold standard for determining participant group or dataset size in qualitative research. Lots of people talk about sampling, but for me that has sort of more quantitative kind of connotations of selecting a sample from a wider population. And qualitative researchers don't always think about their participant groups in that way. So it is sort of—it is seen as this concept that is useful in all approaches, so that's when it becomes difficult to say, "Well, actually it doesn't really work for mine." For me, saturation is quite a realist concept. It's quite a realist way of thinking about qualitative research because it takes out, to some extent, researcher subjectivity and interpretation from the qualitative research process. Because as soon as you start to conceptualise meaning of something that requires interpretation, i.e. that it isn't self-evident in data, then you open the door to there being lots or even endless possibilities for meaning and making sense of data. In which case you can't saturate because meaning isn't fixed within data. Meaning is always subject to interpretation. So it's less about whether you're doing grounded theory or not. For me, it's more about what kind of qualitative research you're doing. So if you're doing realist, positivist, post-positivist qualitative research, then saturation, as it is conceptualised as information redundancy or data saturation, might be a useful concept for you. Because the assumptions of it make sense in terms of the research that you are doing. But as soon as you move away from realism and post-positivism to critical realism, constructionism, phenomenology, all those kind of different frameworks that shape qualitative research, saturation literally stops making sense. Because as soon as you understand meaning as requiring interpretation by a subjective and situated researcher, you can't saturate because it's not logically possible within your kind of framework.

00:07:41 Sohail Is there another way of conceptualising saturation that could be useful for people who are less positivist and more subjectivist?

00:07:53 Victoria I think the challenge for researchers in that camp, and that's where I put myself, is we're operating in a universe where positivism is king. And that impacts obviously quantitative research, but qualitative research as well. So often examiners, reviewers, editors will ask us to talk about saturation, that it will be a requirement for kind of publishing. I mean, I was talking to colleagues recently and they've been told by reviewers, "You have to talk about how you achieve saturation." So you either have the confidence and the resources to argue and say, "Well, actually that doesn't work for my research," or you might feel that you have to kind of compromise. So if you feel you have to use saturation because it keeps other people happy and it makes sense to them, then I think it's helpful to specify... what you mean by that and how you're making sense of it and how you are claiming to achieve it. Because what I often see in research is, "Saturation was achieved, blah, blah, blah." No discussion of, "How do we make that judgment? What we did to kind of arrive at that judgment?" And I think having some kind of more open discussion about—you know, some honesty, "Yeah. Well, it was based on my least impressions of the data during data collection that we weren't getting anything new." "You know, fair enough." I think it's—for me, it's a difficult concept to rehabilitate because it is so based in a realist kind of positivist understanding. So for me, I want to look to other concepts that provide a rationale. Well, I mean, to be honest, I don't really care. If it's subjective and it's interpretive you—kind of you make subjective and interpretive judgements. But I recognise the pragmatic need of a concept that sounds kind of concrete and sciencey. And so I quite like the concept of—I'm not going to be pronounce her name correctly. I think it's Kirsti

Malterud and colleagues talking about information power. So this is—they sort of offer it up as an alternative to saturation that, “Here’s a concept for thinking about the size of your dataset that is underpinned by qualitative principles,” and you’re making a subjective judgment about whether your dataset has sufficient kind of interpretive power to enable you to do the analysis you want to do. So it sort of sounds concrete and it—you know, it will probably sound quite persuasive to a sceptical reviewer, but it nonetheless kind of centres the subjective and the interpretive elements of qualitative research. So I quite like that concept.

- 00:10:42 Sohail Okay. Can you speak a bit more about that concept? So how do you make this subjective judgment about whether your data has sufficient interpretive power? What could someone, you know, take from that? That seems quite vague still.
- 00:11:01 Victoria Yeah, it is vague and I think kind of sitting with the vagueness is kind of helpful. I mean, it might be helpful to talk through what I do with my students. So I have a student using, I don’t know, IPA, TA different methods and methodologies. We sort of have a pragmatic discussion at the start of the process about, “So, this is what research using that method for this qualification, for this degree, this is the kind of size of participant group people usually have. This is the ballpark figure.” So it’s very pragmatic. The kind of initial discussion is, “This is what will fly. This is what will be seen as legitimate. This is what will be okay with your examiners.” And then in practice we engage with the data as it is being collected. So if people are doing focus groups or interviews, they transcribe it, they send the transcripts through to me. We’ll have a meeting after the first couple and kind of reflect on how it’s going and they might make some changes to the interview guide and the interview process. And then we continually kind of review and have a sense of the diversity of the data, the richness of the data. And it’s a very sort of pragmatic interpretive, “This feels like enough. This is enough to do a rich analysis.” And it is really hard to make it more concrete because it is an interpretive subjective kind of situated judgment. So I suppose what I want to encourage people to do is to be able to sit with that uncertainty rather than seek out kind of concrete kind of formula. Which I know is a really hard ask but so much of qualitative research is subjective and interpretive. Of course, our size of our data set is going to be as well. Of course it is.
- 00:12:47 Sohail To touch on that, that it is difficult to sit with that sort of vagueness or that subjectivity even if your qualitative research and your philosophical underpinnings are subjectivists. Because as you mentioned, there is a reputation certain qualitative research has about being vague, about being sort of like data goes into a black box and then it comes out. And this can be an issue, as you mentioned, with examiners. So is there a culture change that is needed in certain areas in qualitative research in our reputation?
- 00:13:33 Victoria For sure. Definitely. I mean, I think I would see my sort of focus, or Ginny and my focus, when we kind of—well, we’re always working together on qualitative stuff and thematic analysis, is trying to articulate a set of values for qualitative research that’s non positivist, and increasing understanding of that so that people can do that research and have that research judged on its own terms rather than the imposition of kind of positivist, post-positivist values on that. So that is my kind of lofty goal and aspiration. Is that we can create a culture for qualitative research that understands its diversity and that is prepared to judge qualitative research or individual pieces of qualitative research on its own terms. But I think that’s quite challenging because the influence of positivism and post-positivism is so profound and really kind of lingers. And I think the other thing that we’re quite obsessed with that we talk about a lot is the idea of knowing practice. The idea that you are being deliberative. That you are making deliberate choices, that you are kind of conscious of the diversity of qualitative research, that you understand that you’re taking a particular position within qualitative research and you are able to articulate that. And I think what we see is a lot of unknowing practice. So people use saturation because they’ve been told, “This is how you define or determine your sample size,” or, “This is the word—magic word you have to mention,” without actually spending some time with the concept, understanding its origins, understanding the assumptions it makes, and making a knowing and deliberative decision about, “Well, does this fit with the research that I’m doing? And if

it doesn't fit, well, why am I using it? I'm using it pragmatically because it's what other people want me to use." So it's really a process of kind of understanding what it is we're doing, understand the foundations, the kind of principles and making decisions based on those principles and values. So that's what I'd like qualitative research to kind of get to. And then I think we'd probably see less saturation because people would be not using the concept because they've been told to use it or because other people have described it as crucial, but they've actually thought through the assumptions underpinning it and what it means and whether it fits with their research.

- 00:16:02 Sohail So it's interesting you say, you know, again, 'been told to use it' or this is expected of people. And, you know, your phrase 'saturation is a magic word' sort of stays with me. I'm thinking, is also thematic analysis like a magic phrase which people often include in their work to say, "This is what we've done," but not really, you know, having that deliberate thought through set of choices to make whatever analysis technique they're using to fit their work and their research? So it seems like a broader problem than just saturation, is what I'm getting at.
- 00:16:51 Victoria Yeah.
- 00:16:51 Sohail This sort of almost tick box....
- 00:16:55 Victoria Yeah. I know what thematic analysis is. "I understand this is a reference I need to cite for it, and then I'll bang it into my paper to justify what I did. And this is what I did." I mean—but I mean, honestly I was working on a chapter on thematic analysis for an edited book on Monday and Tuesday, and I was just looking for a few examples. It's for the field of counselling research. I was just looking for a few examples of using particular data collection methods. And I was skimming through one paper and I started reading their description of what they did and they said, "Kind of following the procedures outlined by Braun and Clarke, we did blah, blah, blah." And then I read the description of the process and it was like, "What? Eh, what?" "First we created a codebook." "That's nothing. We don't say that! We don't say that!" And the whole description of what they did, which they said was what we say to do, had nothing to do with our method and represented a completely different approach to qualitative research. So I think you are right. This is a more general problem of people being told, "You must say this. You must do this," or, "This is this," and not really understanding what it is they're doing and not really having an understanding of, you know. I mean, we increasingly talk about thematic analysis as a, you know, a family of methods as a diversity of methods because it isn't one approach. There are lots of different ways of doing it. But if you don't understand that, you get these strange papers of, "We followed Braun and Clarke then we did stuff that they don't say." Or indeed the one I particularly enjoy is people citing us to support the idea that saturation can be achieved in twelve interviews, when the only thing we've said about that is to criticise that study that that statement is based on. To write a ten-thousand-word critique of that study [chuckles] that, that kind of statement comes from. So yeah, I think knowing practice and steering away from kind of magic words is really important.
- 00:18:59 Sohail Is it just about the philosophical position you take as to whether saturation is useful or not? Is it partly dependent on the subject matter you're investigating?
- 00:19:15 Victoria I think it's probably more relevant if you are working with very concrete data and you have a very concrete research question. So if you are looking at something that's—I'm trying to think of an example, but I can't. Something that's quite sort of concrete, that's more definitive, that's less about narrative or emotions or interpretation, then a concept like saturation will make more sense. Because you're trying to describe things that are relatively concrete that you are not—that interpretation is kind of playing less of a role in the research. So I can see in those kind of circumstances that it makes more sense. But as soon as you get the data that's about—I don't know, that's more about lived experience, how people make sense of experiences, where people's kind of interpretive kind of sense making comes into play, it's far harder to utilise that concept, I think. Because the data isn't concrete. It isn't very kind of practical. So, yeah, it has less of a role to play there, I think.

- 00:20:31 Sohail Great. Thanks. I also wanted at this point to bring in a question from one of our listeners. So this is a question from Kate Spencer-Brand. Kate asks, "My project is complex in that it's longitudinal, so I'm interviewing each participant at two time points. Are there any specific tips or thoughts on saturation in a longitudinal context in terms of serial interviews or ethnographies?" Does saturation mean something different in that—those contexts?
- 00:21:12 Victoria I mean, again, I think your interpretive framework is really kind of key there. Because if you are approaching the research from a kind of more realist perspective, then saturation kind of makes sense. But I think in longitudinal research, the thing that always strikes me about longitudinal research is that it's about the stories people tell about those experiences and how those stories might change over time as well as how the experiences change. And so I see less of a role for kind of saturation there. Because to me, as a qualitative researcher, what longitudinal research captures is the kind of temporality of our sense making and the context bound nature of our sense making. But obviously you can approach longitudinal research differently. You can view experience as something relatively kind of concrete and fixed. And what you are looking at is kind of shifts in the real world experience rather than shifts in sense making. And, again, in that context saturation might make more sense.
- 00:22:14 Sohail Great. Thank you. Coming towards the end of our time, I just wanted to ask, why do you think we ended up with saturation as a concept? I know you began by talking about the theory of, you know, its historical context. So it began with grounded theory, but why did it take such a hold in the mind of qualitative researchers?
- 00:22:37 Victoria There's a fabulous paper that I talk about so often by Lara Varpio—one day I have to check if I'm pronouncing her name correctly—and colleagues called *Shedding the Cobra Effect*. And what they argue is that there are these constructs within qualitative research like saturation, like triangulation, like member checking, that are all based on kind of realist assumptions and that hold an appeal within a positivist framework. They make qualitative research make sense within the kind of dominant value framework of whatever discipline you are in. And over time, as different value frameworks of different ways of thinking about qualitative research have developed, these concepts that helped qualitative research gain legitimacy have started to kind of weigh us down. Have started to become unhelpful baggage because we've developed new ways of thinking, new ways of doing, new sets of values, new approaches, new methods, and yet we're still being held to this set of standards, these criteria, these concepts that no longer really make sense within those kind of new ways of doing qualitative research. So I think the popularity of the concept, the reason why it's so embedded is because it makes sense within the dominant way of thinking that most people are trained within whatever discipline they're in. And it's really hard to kind of shake that off and think differently. And when you have a diverse community of scholars, and some of them think differently but most of them still think in the way that they were trained to think, then of course the concepts that make sense to them are going to be the ones that kind of dominate. So, I really like their analysis because I think it makes a lot of sense and it's a good explanation of why this concept, that some of us find incredibly unhelpful, is still wielding so much influence within qualitative research. So I would definitely check that paper out because I think it's a really sound analysis.
- 00:24:50 Sohail Thank you. And what do you think, or what would you say to—you know, we have GTAs who are teaching on qualitative methods modules. We have staff lecturers. I also teach on a qualitative methods module. So it sounds like what you're getting at, there's something quite fundamental about how we—you know, how we teach qualitative research that could be changed. Could you expand on that and maybe give some thoughts? How do you do your teaching, for instance?
- 00:25:26 Victoria [chuckles] Oh, probably in a way that my students don't appreciate. [chuckles] I do it in a very values centred way. So I say, "There's the different ways of thinking about qualitative research. There's this way, there's this way, there's this way, and this is the way we are thinking about it. We are going to teach you this values framework. There

are other values frameworks that are available, but we're not—you know, we're not centring them because this is, we think, the way that makes sense to us for doing qualitative research. So a distinction I find really helpful from Kidder and Fine is kind of small q and Big Q qualitative. So small q, quali techniques so collecting quali data. Analysing quali data as quali data, but still within the kind of dominant values framework of the discipline, which is typically positivism, post-positivism, I'm obviously glossing and that's all really complex, but yeah. Or there's Big Q, which is both qualitative techniques and qualitative values. And those values can be really different. So you can have constructivist grounded theory, IPA, TA of all different varieties, narrative analysis, discourse analysis, but they all fit under that sort of Big Q umbrella, because they all have their own set of values and their own particular qualitative kind of techniques. So what I say to students is, "There's this way of doing quali and there's this way of doing quali, and within both there's some diversity. There's far more diversity within Big Q and we are going to focus on this big Q framework. And this is my positioning and this is where I come from. This is how I think about qualitative research." So I try—or I strive because I don't think it's ever possible to be kind of fully knowing, to have full insight, as any therapist would tell you. I strive to kind of teach qualitative research in a knowing and positioned way. So, this is where I'm coming from. This is how I see things. So one thing that Ginny and I do quite a bit in our writing, because we're aware that we're talking to an interdisciplinary audience, is we try and acknowledge our positioning as psychologists. And that's often really apparent in the questions that we get asked. And they are—people ask us about, I don't know, public and patient involvement. It's like, "We don't know." So that's not part of our—you know, our kind of background. It's not what we do. We don't know everything. We're very positioned, "This is where we come from. This is what's influenced us." So that's how I'd love qualitative research to be taught. But I often don't think it is taught that way. I think it's there's this concept that we know is important, so we talk about it. And it's I think qualitative—people who are teaching qualitative methods need to do it in a more reflexive way, to understand their positioning and to understand how their positioning shapes their standpoint, shapes their values and be able to articulate, "This is a particular take. There are other takes. This is my take." And I think that's where—certainly experiences I've had of kind of teaching in kind of mixed teams is that's when things get really confusing. Is if some people are teaching in a sort of position valued way and then some people are just, "This is how you do qualitative research." That's when I get questions from students, "Well, so-and-so said X and you said Y and I don't know how to reconcile those two things." And so I think that, I would say, is if you are team teaching that's a really useful conversation to have. "What are your qualitative research values?" And sometimes we don't know and we need to kind of think about it and reflect on it and understand where we are positioned in the terrain of qualitative research. It's not about knowing everything because I—people ask me about methods all the time that I've never heard of, methodologies that are completely foreign and new to me. But it's about knowing enough to know that you are positioned, that there are other possibilities that exist and this is how you sit in relation—broadly in relation to these other possibilities.

00:29:38 Sohail Great, thank you. That's kind of quite useful advice generally for any teaching. And there's a nice sort of authenticity and honesty to that, which I think students might appreciate. So yeah, good advice. I think that's more or less all we have time for. Or do you have anything else you want to add? And also, could you tell us where we can maybe watch videos or—I know you've got a lot of papers, but maybe there's some things in particular you want to highlight.

00:30:15 Victoria So if you go to www.thematicanalysis.net, that is our newish thematic analysis website. It's hosted by the University of Auckland, and you'll find everything there that we do. We—eventually, sooner or later it will get put on that website. So there's an annotated reading list for all our papers, links to the papers on the publisher's website, links to YouTube lectures, links to all the podcasts. Everything gets kind of put on there. So it's a kind of one-stop shop for everything you need. And the other thing I guess it would be really good to highlight is our new book called imaginatively and originally *Thematic Analysis: A Practical Guide* published by SAGE. That was published I think back in October or November. Brand new and represents all the thinking we've been doing

about thematic analysis since we first wrote about it in 2006. And so now at least it provides the definitive guide to our approach to thematic analysis.

00:31:21 Sohail Amazing. Thank you so much. I'll definitely be going on that website probably after this.

00:31:26 Victoria [chuckles]

00:31:28 Sohail So, thank you so much for your time and your thoughts and your advice. They're really appreciated and I think that the people listening will have taken a lot out of this. So I really appreciate it. Thank you so much.

00:31:42 Victoria Thank you.

00:31:44 Sohail Well, that was a quality podcast from Victoria Clarke. Thank you very much. Speaking of quality, next we are talking to associate professor of Communication and Mental Health at the University of Leicester, Dr Michelle O'Reilly. Dr O'Reilly is going to talk to us about what makes quality qualitative research. It promises to be a fascinating podcast. Please tune in.

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