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Sampling and thematic analysis: a response to Fugard and Potts

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Sampling and thematic analysis: a response to Fugard and Potts

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Fugard and Potts’ paper focuses on an issue that is often of concern for qualitative researchers: how many informants to interview, and/or how many settings to observe. However, I think their approach to this issue is misconceived, and could have damaging consequences.

How many cases to study is a question that requires some consideration at the start of the research process, but qualitative researchers do not usually have to make a final decision about this at that point: they can restructure their research design subsequently. Indeed, some approaches, such as grounded theorizing, demand iterative re-design of the research. Typically, qualitative research involves collecting data from a few participants, and/or in one place, and then making decisions subsequently about whether other people need to be interviewed and/or other places observed. The pressure for an answer to the question of ‘how many cases’ at the outset of the research process comes, in large part, from the need to indicate ‘sample size’ in research proposals being prepared for funding bodies and/or ethics committees. These bodies often treat this as a key issue and judge research proposals on the basis of how well it has been addressed. Moreover, like Fugard and Potts, they often see it as analogous to sampling in surveys. Thus, in specifying their proposed ‘sample size’, applicants have to anticipate what will seem reasonable to committees and referees both as regards some notion of coverage, analogous to the representativeness of a survey sample, and what will be viable, in terms of their having the time and resources to process and analyze the amount of data likely to be produced. To a large extent, this is an institutionally generated problem for qualitative research.

Equally important, the issue of how many people to interview, or how many places to observe, is rarely conceptualized by qualitative researchers in the manner that Fugard and Potts approach it: in terms of whether sufficient data will be collected to identify all the relevant themes. This is, in part, because what will be relevant themes depends upon analysis of the data and further development and refinement of the research questions, a process that takes place over the course of inquiry. Moreover, if there is any sample-to-population relationship involved here, it is one between the amount of data collected, or the number of data segments, and the prevalence of particular themes. The authors recognize this near the end of their paper when they comment that:

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One limitation of the approach is that we have not attempted to address the effect of within-participant sampling. Intuitively a longer interview or repeated interviewing with someone makes it more likely they will produce more theme-relevant material. This renders the mode of calculation they propose worthless. Furthermore, it is not so much the frequency with which data relevant to a theme occurs that is important but rather whether particular data segments allow a fruitful analytic argument to be developed and tested. Further data will not always do this, as is recognized by the notion of saturation. At the same time, data not directly relevant to a theme may facilitate its development because they contribute to another theme to which it is related. What this underlines is that themes do not stand alone: as the analysis develops they become increasingly integrated into a narrative that provides answers to a set of developed research questions.

In my view, then, Fugard and Potts’ whole discussion of sampling in relation to theme analysis is largely beside the point. It is true, of course, that how many people one is going to interview or how many settings one will observe can sometimes be driven by a concern to minimize the chances of findings being unrepresentative of some population. However, much of the time this is a subordinate consideration in qualitative research. As with experimental work, the aim, typically, is to develop and/or test an explanation or theory. In order to do this, which case or cases are selected for investigation at the beginning may not be very significant. And, later, it will often be not so much a matter of how many cases one investigates but which ones: the whole point of theoretical sampling, for instance, is to select cases that are similar, or that contrast, in ways which maximize fruitful development of the emerging theory.

A final concern I have about this paper is that the idea that it is possible to calculate how many cases should be investigated will be picked up and applied by funding bodies and others, even though it bears little relationship to the logic of qualitative inquiry. This can happen even though the authors do not intend it. Of course, in these circumstances qualitative researchers may be able to increase the chances of a favorable response from referees and funders by applying the formula. But this is likely to spread confusion about qualitative research, and further distort its practice.

In conclusion, this paper seems to me to be a misuse of probabilistic analysis: it is applied to a topic which it cannot address effectively. The method of calculation proposed may be useful for the sort of research that the authors mention at one point, where there is a concern to include within the sample a sufficient proportion of people who have had some particular sort of experience. However, this is quite different from the issue of how to develop themes in qualitative analysis. To formulate the latter in terms of sample size is misleading, and is likely to be counterproductive.