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Sonderausgabe zum zehnjährigen Jubiläum/Special Issue for the Tenth Anniversary

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Part A Fundamentals
- **Teil B Forschungsüberblicke und einzelne Ansätze/**
Part B Research Overviews and Specific Approaches
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Including Visual Discourse Materials in Situational Analysis Research

Abstract: This article introduces the use of Situational Analysis methods with extant »visual discourse« materials found in a particular situation of inquiry. It describes the pressing need to include such analyses in social science research as imagery increasingly pervades and becomes constitutive of daily life. The initial steps are: deciding, locating, collecting, and tracking the extant visual discourse materials. Next, the analyst enters, examines, and begins memoing those materials, including both one's own impressions and writing specific kinds of guided memos. Next is making the four kinds of maps involved in doing SA research: »situational«, »relational«, »social worlds/arenas« and »positional maps« of these visual discourse materials. The final step is highlighting the most interesting and previously unstudied features of those materials in the research report.

Keywords: situational analysis, extant visual materials, situational maps, relational maps, social worlds/arenas maps, positional maps, memoing

Zusammenfassung: Dieser Artikel führt in die Anwendung von Methoden der Situationsanalyse in Bezug auf visuelle Diskursmaterialien ein, die in einer bestimmten Untersuchungssituation vorkommen. Er setzt an der dringenden Notwendigkeit an, solche Daten und ihre Analyse in die sozialwissenschaftliche Forschung einzubeziehen, da Bilder das tägliche Leben zunehmend durchdringen und es (mit) konstituieren. Die ersten Schritte sind: Entscheiden, Verorten, Sammeln und Nachverfolgen der vorkommenden visuellen Diskursmaterialien. Im nächsten Schritt geht es darum, sich in diese Materialien zu vertiefen, sie zu erschließen, und dazu erste Memos anzulegen. Diese Memos können sowohl erste eigene Eindrücke festhalten, wie auch spezifischen Leitfragen folgen. Als nächstes werden in Bezug auf die visuellen Diskursdaten die vier Arten von Maps erstellt, die bei Situationsanalysen zum Einsatz kommen: »Situationsmaps«, »Relationsmaps«, »Soziale Welten/Arenen-Maps« und »Positionsmaps«. Der letzte Schritt besteht in der Hervorhebung der interessantesten und bislang nicht erforschten Aspekte dieser Materialien in einem Forschungsbericht.

Schlagwörter: Situationsanalyse, visuelle Diskursmaterialien, Situationsmap, Relationsmap, Soziale Welten/Arenen-Map, Positionsmap, Verfassen von Memos

Introduction

I am honored to join in celebrating the tenth anniversary of the impressive journal *Discourse Studies*. In fact, this contribution allows me to begin to rectify an earlier omission. For a variety of reasons,¹ the chapter on analyzing visual discourse materials was not included in the German translation of my book »Situationsanalyse: Grounded Theory nach dem Postmodern Turn« (Clarke 2012), so generously arranged by Reiner Keller.² Yet analyzing visual discourse materials found in the situation one is studying *is* central to doing a robust and thorough Situational Analysis (SA) research project.

There are significant visual elements in most if not all situations of inquiry, and they fully deserve our attention in qualitative inquiry today. Given the pervasiveness and elaboration of visual cultures in the 21st century, we ignore them at our analytic peril. This article therefore focuses on how SA can engage visual elements in research situations including how *visuality is constitutive* of those situations, and how to come to fuller terms with the rich and dense contributions of visual cultures to social life.

Happily, the inclusion of visual materials in scholarly journals and books is becoming increasingly common. The digital revolution is transforming the making, altering, storing, and reproduction of images while simultaneously lowering the costs of doing so. Thus, in addition to studying the un(der)studied in qualitative inquiry as Strauss (1993) advocated, we will be able to publish research on visual materials in sites and ways that formerly could only be fantasized.

Because readers will be unevenly exposed to studies of visual discourse, I begin by providing a very brief historical and conceptual entrée. I then turn to the practicalities of actually doing SA of visual discourse materials. Topics include deciding which visual materials, how to track and analytically memo them, and doing all four kinds of SA maps of the visual materials done in SA projects.

Entering Visual Discourses

»[T]he postmodern is a visual culture.« (Mirzoeff 1998, p. 4)

»I argue for the need to recognize, and act upon, the occurrence of a profound and comprehensive intellectual revolution. This overturning affects all branches of daily life and even the more arcane reaches of humanistic and scientific research and practice. Simply put, it is the radical shift underway since the eighteenth century from a text-based to a visually-dependent culture.« (Stafford, 1991, p. xviii)

1 Two factors determined this. First, it was a very long chapter. Second, it would have been impossible to obtain permission to use one of the exemplars, a CD-ROM disk, as the software company no longer existed, a common problem, I learned to my regret.

2 See Clarke/Keller (2014). In German, see also Clarke (2011), Gauditz et al. (2023), Keller (2020), Pöferl (2020).

»[N]othing will stop visual methods' becoming one of the most important qualitative research methodologies in the 21st century.« (Prosser (2011, p. 494)

First and foremost, as a distinctive method of qualitative inquiry, Situational Analysis (SA) seeks to understand the dense complexities of particular »*extant situations*«. Given that images are always already part of most if not all situations, our focus here is on including their analysis. SA can be used with still images, film, video, and other visual forms, including multimedia.³

Visual discourses have entered the social sciences and humanities as subjects of research by multiple routes and for multiple reasons, especially since the interpretive and poststructural turns. As Knoblauch et al. observed early this century:

»From their origins in disciplines like social anthropology and sociology, visual research methods are now firmly entrenched in major fields of inquiry, including sociology, health and nursing studies, educational research, criminology, human and cultural geography, media and cultural studies, discursive and social psychology, management and organization studies, political science and policy analysis.« (Knoblauch et al. 2008, Abstract)

The original provocations to include analysis of visual discourse materials in SA came from many directions. Clarke herself had pursued visual projects before creating SA (e.g., Moore/Clarke 1995, 2001). Perhaps most potent were the epigraphs above: Mirzoeff's insistence that a method that seeks to engage the postmodern must engage the visual, Stafford's famous call for visual literacies, and Prosser's affirmation of inclusion of the visual. Since then, Heywood and Sandywell have further emphasized the importance of »understanding visual culture as embodied in social and cultural practices [...] the ›institutional turn‹ in visual studies« (Heywood/Sandywell 2012, p.4). And a slew of new books underscores the increasing salience of the visual in social science research today.⁴

Doing Situational Analyses of Visual Discourse Materials

»Kids know it better [...] Kids don't look at pictures as diverting illustrations or supplements to the text. They read the pictures avidly, mining them for every bit of information, mood, feeling, mystery, and nuance of the world fanning open before them.« (Winn 2003, p. E1)

3 On technical aspects, see the 2008 Special Issue on Visual Research, *Forum Qualitative Sozialforschung/Forum: Qualitative Social Research*, 9(3). See also Harper (2012, Chapter 7) and Rose (2013). We do *not* discuss producing *new* visual materials as part of a research project or using visual materials in the research process itself (e.g., to solicit responses). Nor do we examine the huge area of audience perception or reception. But see e.g., Chaplin (1994, Chapter 5), Harper (2012), Pauwels/Mannay (2020), and Rose (2013).

4 For excellent entrée, see Sturken/Cartwright (2017), Mirzoeff (2012), Rose (2022), Kress and van Leeuwen (2016), Pauwels/Mannay (2020), and Prosser (2011).

SA fosters and supports the analysis of *extant* visual discourse materials – materials *found in the situation being researched* – as part of situational analysis research. As with extant historical and narrative discourse materials (see Clarke/Friese/Washburn 2018, Chapters 11 and 13), analysis of visual discourse materials (see Chapter 12) can be the primary focus of a small or large project, or a subpart of a larger project, such as a dissertation or book chapter.

But what do we mean by ›visual data‹? What counts as visual data for possible analysis? With Emmison and Smith, we argue for a very broad definition:

»Social life is visual in diverse and counterintuitive ways. Consequently, there are many more forms of visual data than the photograph, the advertisement and the television program. Objects and buildings carry meanings through visual means just like images. Clothing and body language are significant signs which we use to establish identity and negotiate public situations. [...] [V]isual data can be located in sources as diverse as wedding albums and pornography, living rooms and waiting rooms, living bodies and stony statues, august museums and playful shopping malls [...] drawings, maps, sketches, diagrams, [...] directional signs.« (Emmison/Smith 2000, pp. ix., xi, 1)

SA can be done with all these kinds of visual data and others. Emmison and Smith also remind us that »the raw material for visual investigation must also be viewed, understood or placed in some analytical framework before they can be regarded as data« (ibid., p. 4). In our language, they must be *situated*. Our entrée theoretical and substantive questions thus become:

- What project is furthered or question better answered by analyzing a particular set of visual images?
- What are these visual data *for*? What do they advocate or object to in some way?
- What *situation(s) of inquiry* do they speak from and to?

In doing SA of visual data, our recommendations combine the recording of initial impressionistic interpretations in memos, along with doing systematic guided memos detailed in Clarke/Friese/Washburn (2018, pp. 279–284).⁵ The goal is to open visual data up for analysis. Researchers are expected to use their own insights along with the methods specified rather than symbolically stand out of the way so that some heretofore repressed »voice« or other analytic can »emerge« (see Clarke 2005, pp. 11–19; Clarke/Friese/Washburn 2018, pp. 33–41).

One thing is clear. Doing visual analyses requires us to stop and stare trebly hard in order to rupture the taken-for-grantedness of »good looking« (Stafford 1996) in which we usually dwell. Remember, there is no one »correct« reading of any image (e.g., Hall/Evans/Nixon 2013). We need to do multiple readings and consider them at length. Making and keeping *possible* interpretations of wholes, parts, particular things imaged, and

5 For more general guidance on memoing, see Charmaz (2014, Chapter 7), Keane (2022), Lempert (2007), and Mihás (2022).

so on in memos can be exceptionally useful downstream. At times it can be the very ambivalence of an image that makes it matter most. Being able to review your various interpretations in memos done at different times, for example, can be invaluable in presenting a robust range of possibilities.

Which Visual Materials? Deciding, Locating, Collecting, Tracking

»Visual culture is what is seen.« (Gertrude Stein, quoted in Elkins 2003, p. 4)

Four main steps are initially involved before analysis gets under way: deciding, locating, collecting, and tracking the visual materials. First: Where shall the visual materials come from? In short, *the materials should be the best range of visuals you can obtain found in the situation that you have chosen to research*. If you are pursuing a multisite project, the visual materials should articulate well with the other sites you are examining and/or ›represent‹ each site fully, including its complexities.

Fosket (2015), for example, studied a large clinical trial of cancer chemoprevention drugs. While she mapped the trial with care, she could also have studied the visual images associated with the trial, usually used in identifying and promoting itself. These included images on flyers and other paper materials about the trial given to participants, the logo, and other design elements of the various freebie and ›for sale‹ items distributed, from sweatshirts to mugs, to tote bags, and so on. We assume the researcher will locate and collect visual materials of interest in their situation of inquiry as part of the research process, or ›just in case‹.

The next two steps, collecting and tracking visual materials, are often fussy, obsessive, and tedious tasks, and may well be distributed across the project. Doing these tasks is very much like entering bibliography: if you get it right the first time, *much* anguish is saved downstream. If you don't, the capacity to publish something cherished may disappear.⁶ It is best done where there is space to spread out and a handy photocopier, as it typically involves making working copies and preserving originals for later duplication.

Tracking materials can be crucial if you want to publish a visual for which written permission is required—and it often is required.⁷ Some kind of log should be maintained that tracks the ›provenance‹ of all the materials—where every visual came from in terms of ›who, what, where, when, how, how much‹, and so on.

6 Online publishing is much more amenable to inclusion of visual materials because costs are negligible. Regarding print publication, advance inquiries are recommended. The currently operant rule of thumb is that the author provides the written permission of the original publisher. They may also be asked to cover costs of production work (possibly steep) and provide the publisher with either camera-ready (scanable) or digital files.

7 Permission to reproduce visual materials for ›academic scholarly purposes‹ is often free and granted upon request. However, some copyright holders will not grant permission; in such situations, careful narratives of the images must suffice.

Entering and Memoing Visual Discourse Materials

»[I]t is the act of describing that enables the act of seeing.« (Price 1994, p. 5)

Memoing is requisite. There are four main levels of analysis of an image (Ball/Smith 2001):

1. its content—what is given;
2. its referents—what it refers to;
3. its context(s) or situatedness—where it appears; and
4. what uses are made of it.

All four points should be covered in your memo on each visual. Once a particular point is made somewhere in your memo, you do *not* need to say the same thing again – but do refer back to it.

We also recommend writing some distinctive kinds of memos for each visual item: the situating or locating, the big picture, and the specification memos. Each one pushes you in doing a particular kind of analytic work regarding that visual (see Clarke/Friese/Washburn 2018, pp. 279–284).

The goal is to be systematic and thorough – not obsessive. Do annotate or keyword files in some way that works for you so that you can retrieve key points and codes. Even keywords listed for each memo on your memo list (e.g., memo title, date of first entry, date of last entry, and keywords) can be an excellent retrieval device. (See *ibid.*, pp. 33–41, and note 4 for further references on memoing.)

SA Mapping of Visual Discourse Materials

SA first and foremost seeks to understand the dense complexities and relationalities of a particular situation broadly conceived. The fundamental methodological approach of SA is cartographic. Here researchers generate a series of *analytic* maps of the situation under study, along with memos about these maps and on other topics that document and detail the analysis in progress. The situation of inquiry is *empirically* constructed by the analyst through making the following four kinds of maps and memos:⁸

1. **Situational maps** lay out the *major elements* human, nonhuman, discursive, and others empirically found in the research situation of inquiry;
2. **Relational maps**, made using situational maps, analyze the *relations among the different elements* found in the situation;
3. **Social worlds/arenas maps** lay out the *collective actors and the arena(s)* of commitment and discourse within which they are engaged in ongoing negotiations. They provide organizational/institutional interpretations of the situation; and

8 For templates for making each of the four kinds of maps, see the Companion Website to Clarke, Friese, & Washburn (2018) at <https://study.sagepub.com/clarke2e/student-resources/templates>.

4. **Positional maps** lay out the *major positions taken, and not taken*, in the discursive data in relation to particular axes of difference, concern, and controversy around issues in the situation of inquiry.

All four kinds of maps done in an SA project are done with visual materials as well. However, because of the extensive memoing of the imagery done as part of »collecting and tracking«, the researcher may be analyzing memos as well as the visual imagery, thereby deepening the analysis. Because of limited space, this paper assumes a basic knowledge of SA on the part of readers. For example, how to make the four main kinds of SA maps, and how and why each makes important analytic contributions are not discussed here.⁹

Doing Situational Maps of Visual Discourse Materials

»Visuals are pervasive in public, work, and private space, and we have no choice but to look.« (Prosser 2011, p. 479)

Significantly, the situational, relational, social worlds/arenas, and positional maps done vis-à-vis visual research materials can take you far beyond these discursive materials per se. They rely, perhaps more than interview and ethnographic data, on the researcher's creative insight, logic, and reflexivity, as well as on the research materials. They rely especially on the knowledge the researcher has gained about the research area – the broader situation of inquiry – through the very doing of the research – the on-going research processes per se.

The general tasks of doing situational maps and analyses of narrative materials can now be applied to the narratives and codes you have produced of the visual materials along with the visual materials themselves. *Your situational map should include all analytically pertinent human and nonhuman, material, and symbolic/discursive elements of a particular image.* It is likely that, over time, not all will remain of interest. As with other data, first efforts are usually intentionally very messy, and hence very accessible and manipulable. Some people will prefer to continue working in this fashion.

One of the challenges of mapping visual materials is their partiality. Parts–elements–may well be missing that you know as an intelligent analyst are “really” present in the broader situation of which this visual is a part. But if they are not in the visual, *this is worthy of note*. There may well be many *implicated* actors whose agency is denied by other actors in that situation/image, and so on. Your responsibility as an analyst is to try and specify these while also noting their *explicit* absence.

There is a particular delicacy of reflexivity and ethicality at play here: You do not want to argue beyond the evidence, but you also don't want to play dumb. Feminist methodologist Patti Lather (1991) wrote about »getting smart«, and one way to do so is to analytically point to *possible* implicated actors, institutions, and so on in your memos. Hold on

9 See the main SA text, Clarke/Friese/Washburn (2018, Chapter 12), or Clarke/Washburn/Friese (2022, Chapter 1).

to your hunches – you can clarify these points through theoretical sampling downstream. So, in your initial situational map, implicated elements can, if you like, be indicated as implicated—or not. Whether you ultimately find these interesting and worthy of further analytic pursuit remains a wide-open question.

As with other genres of data/materials, you should do both messy and ordered situational maps, carefully dating them and keeping old versions just in case.

Doing Relational Maps of Visual Discourse Materials

As in usual SA projects, somewhat final situational maps can be used to make relational maps. Arrows are drawn between one element and all the others, and you attempt to narrate the nature of that line – the nature of that relationship. Why and how does it matter? Under what conditions? Moving quickly, make notes of anything interesting. Then move on to another element and its relationships. Don't overdo. Don't underdo. Flag important memos.

Doing Social Worlds/Arenas Maps of Visual Discourse Materials

»[T]he aesthetics of consumer culture push us further to understand how visual culture, as a form of consumer culture, circulates and is taken up by different stakeholders – individuals, communities, nations and even companies – to develop relationships.« (Horst/Hjorth 2014, p. 127)

The visual materials you have gathered and begun analyzing may or may not allow you to portray a complete discourse situation and do a social worlds/arenas analysis of them. More commonly, the visual imagery you have gathered will have been produced by one major social world in your situation of concern, and you may or may not be studying the entire arena. Thus you may have images of one particular social world representing itself, other worlds, human and/or nonhuman actors in the arena, and so on. Or not. Ultimately, if major partialities exist in your data, you will need to address them in your memos.

The issue of *perspective* is obviously key here.

- From whose perspective are the visuals constructed?
- For whom was it constructed?
- What/who are the intended audience(s)?
- Do(es) the image(s) refer to collective action in any way? What kinds of action? Involving what social worlds?
- Are other social worlds represented? If so, how?
- Is there an arena specified or implicated by the pattern of social worlds visualized? If so, how is it portrayed?

Again, memos should be thorough but not repetitive, and have keywords listed. The social worlds/arenas maps may well be very important for your project. The analysis of collective actors and their relations remains rare in qualitative inquiry.

Doing Positional Maps of Visual Discourse Materials

»[D]emystification is the permanent revolution.« (Lyotard 1984, p. 29)

The narration of the images should help you generate a list of key issues and their axes in the visual data—or implicated by the visual data. These may or may not be interesting at first glance, but some should at least be there. The analyst can then simply proceed with making positional maps. We would recommend persisting in the face of disinterest here for at least a little while. Positional maps allow the *specification of absences*—what is *not* there—and this can be especially useful in the analysis of visual materials that one cannot theoretically sample or further interrogate in another interview.

While there is no space to offer exemplars here, both the first and second editions of our text offer ambitious chapters on visual discourse and diverse exemplars (see Clarke 2005, pp. 205–260; and Clarke/Friese/Washburn 2018, pp. 269–312).

Final Comments

»[T]raining in visual methods...is not a luxury but an imperative following the burgeoning growth in visual research around the world.« (Prosser 2011, p. 480)

Given the stunning density and theoretical sophistication of the literature that takes up analysis of visual discourse in art history and criticism, cultural studies, film studies, communications, visual studies, and beyond, this article is obviously oversimplified. My goal has been to draw upon and refer you to some excellent works as well as introduce the main elements of SA of extant visual materials. My hope is to provoke and support inclusion of the visual in SA projects.

In concluding, I address common anxieties among those new to visual analytics. Certainly, after the initial stages of visual analysis recommended here (the locating, big picture, and specification memos, the four situational maps and analytic memos), exploring where such concepts take one can be provocative. You will already have *your own* well-grounded and situated *empirical* analysis upon which to build.

The sophisticated conceptual armamentarium of visual studies offers an elaborating set of tools. As we might draw upon a century of social theory to explore identity or subjectivity issues, for example, we have many resources. For example, Foucault (1975, 1979) argues that disciplinary gazes organize the world, producing »the order of things«. They frame our perceptions—we see and understand the world through »gazes« we have learned, internalized, and/or been disciplined by. Notably, our own disciplines are social

worlds-communities of shared practices and universes of discourse which teach us how to see the world as sociologists, anthropologists, educators, nurses, social workers, communications experts, management analysts, and so on. We often need to learn how other worlds »see the world« in doing visual culture analyses.

Importantly, analyzing *how* »the gaze« works in a particular visual does not predetermine any outcome! These tools are what Blumer (1969) called »sensitizing concepts« that tell us directions in which to look but *not* what to see. Whether using such tools turns out to be as interesting as some other analytic point is an empirical question to be engaged by the researcher. The danger is, as always, not to be seduced by others' concepts and analyses and instead to keep working until you produce your own.¹⁰

Visual studies scholar W. J. T. Mitchell said,

»[W]e still do not know exactly what pictures are, what their relation to language is, how they operate on observers and on the world, how their history is to be understood and what is to be done with or about them.« (Mitchell 1994, p. 13)

We can proceed and research the visual regardless, as long as we remember that *interpreting* images is just that – interpretation – not the discovery of their »truth« (Rose 2022).

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10 For an insightful and reflexive comparative reflection on two images, a painting and a map, see Hanson (2021).

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