



# Thematic Analysis in Organisational Research

**In: The SAGE Handbook of Qualitative Business and Management Research Methods: Methods and Challenges**

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Pub. Date: 2019

Access Date: May 16, 2020

Publishing Company: SAGE Publications Ltd

City: 55 City Road

Print ISBN: 9781526429278

Online ISBN: 9781526430236

DOI: <https://dx.doi.org/10.4135/9781526430236>

Print pages: 219-236

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# Thematic Analysis in Organisational Research

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## Introduction

Thematic analysis is ever-present in qualitative organisational research – it appears in methods textbooks, in empirical articles across the breadth of the discipline, and is taught to business, management and organisational studies students at all levels. Despite this, there remains a good deal of inconsistency and confusion around the topic. As experienced qualitative researchers, we are frequently asked questions such as:

Is it a methodology or a method?

How can we make sense of the differences between various approaches to thematic analysis?

Is there a particular philosophical position that underpins thematic analysis?

How do we know – and demonstrate – that we've done it well?

We are not so naïve as to believe that in this chapter we can come up with definitive answers to these and other questions that will be acceptable to all. We will, though, present our view of how the nature of thematic analysis in qualitative organisational research is best understood, arguing for the distinction between methodology-specific and generic approaches, with the latter being our principal focus. We will emphasise the importance of considering one's particular philosophical position when using thematic analysis and critically compare a number of commonly used approaches. In our conclusion, we will examine some of the main critical arguments raised in relation to thematic analysis, and consider the overall strengths and weaknesses of the method.

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## Thematic Analysis: Definitions, Distinctions and Key Issues

### What is Thematic Analysis?

For us, the term 'thematic analysis' refers to forms of qualitative data analysis that principally focus on identifying, organising and interpreting themes in textual data. We refer to 'forms' in the plural because we argue that it is not a single method but a broad approach which encompasses many different styles. This of course begs the question as to what is meant by 'themes'. Following King and Horrocks (2010), we define themes as 'recurrent and distinctive features of participants' accounts, characterising particular perceptions and/or experiences, which the researcher sees as relevant to the research question' (p. 150). To unpack this definition further, the first element is that a theme is intrinsically recurrent – something distinctive and characteristic in a particular research text (such as an interview transcript). A one-off comment could not

constitute a theme, but we have no problem in principle in identifying a theme that is unique to a single case – in other words, themes do not necessarily have to be identified across cases. The final part of the definition emphasises that themes do not exist independently from the researcher carrying out the analysis. They are not like a fossil hidden in a rock, waiting for someone to come along and break it open to discover them. While there are different philosophical positions on how themes relate to the actual experiences of research participants (which we discuss further shortly), we maintain that even in the mostly strongly realist approaches they cannot be considered as objective entities.

Literature on thematic analysis commonly refers to ‘codes’ and ‘coding’ as well as themes. We take ‘code’ to refer to short comments or abbreviations linked to passages of text to indicate material of relevance to the research aims. Such codes may be developed as analysis proceeds into themes. Coding is therefore the process of indexing text with codes and in due course themes. There is some variation between approaches and disciplines in exactly how these terms are used, so it is important to consider how a particular writer is employing them.

## Why Choose Thematic Analysis?

Thematic analysis is often considered the ‘basic’ method for identifying and analysing patterns in qualitative data (Braun & Clarke, 2013), and as we have noted, is very widely used in qualitative data analysis. Qualitative research often produces large amounts of detailed data: all approaches to thematic analysis seek to identify, make sense of and highlight the key themes in a rich qualitative data set so that important features of the research phenomena can be communicated to and understood by a wider audience. Part of the appeal of thematic approaches to qualitative data analysis lies in their potentially broad application. Thematic analysis methods can be applied to very different qualitative data sets: from first person accounts such as in traditional research interviews, through larger group interviews perhaps obtained in a focus group settings, through to secondary data sources such as media resources. Thematic analysis approaches can be used with data sets of varying sizes, and can be applied to a wide range of research interests and topics. Depending on the particular form of thematic analysis chosen, it can be used from a number of theoretical perspectives, and so applied to usefully answer a wide range of research questions. We will turn now to consider the different approaches within the thematic analysis tradition, and to highlight key considerations that should be taken into account when choosing a particular thematic analysis approach.

## Styles of Thematic Analysis

There are many different ways in which thematic analysis can and has been carried out, which makes it difficult for an inexperienced qualitative organisational researcher to choose which to adopt. The tendency we suspect is for researchers to opt for the version that is most familiar to them, and/or most commonly used in their own area of activity, which may not always be the one that is best suited to the needs of a particular study. While we are not going to propose a full typology here, we will highlight key features that researchers should consider when making a choice of thematic analysis method.

A key distinction is between *methodology-specific* and *generic* forms of thematic analysis. In the former case, one or more types of thematic analysis are used as an integral part of a wider methodology. For instance, Interpretative Phenomenological Analysis (IPA) uses a type that moves from a detailed within-case to a cross-case thematic analysis (Smith et al., 2009). Grounded Theory incorporates several forms of thematic analysis, including open coding and axial coding (Corbin & Strauss, 2008). The crucial point about these is that the researcher cannot simply use the mechanics of the thematic analysis method without adhering to the wider requirements – both philosophical and methodological – of the methodology. One cannot with any credibility decide, after a study has been designed and data collected, to analyse the data using IPA or Grounded Theory.

Generic forms of thematic analysis are, as the name suggests, not tied to any one philosophical, theoretical and/or methodological position. We tend to refer to the various versions of generic thematic analysis as 'styles', rather than treating them as distinct types. This is because there are significant overlaps between them and we would expect researchers to adapt and sometimes blend them to meet the requirements of their study. For the rest of this chapter our main focus will be on generic forms. We will focus on some of the more widely used styles in organisational research – Template Analysis (King & Brooks, 2016); Braun and Clarke's (2006) version of thematic analysis; Matrix Analysis (Nadin & Cassell, 2004) and Framework Analysis (Ritchie & Spencer, 1994). But before turning to particular styles, we should first highlight an issue of particular relevance to those using a generic style of thematic analysis. Such approaches are often more flexible and adaptable than methodology-specific forms because they are not bound by particular theoretical or philosophical commitments. However, this does not render such commitments irrelevant or inconsequential. As such approaches are not tied to a particular philosophical or theoretical position, this creates the necessity for the researcher to work out their own position and ensure that analysis is carried out in a manner that is coherent with it. The risk is that researchers may fail to do this and go through the mechanics of the method without any consideration of the position that underpins it. In the following section, we will highlight some useful ways that researchers using generic forms of thematic analysis can think about and describe the position of their work.

## Philosophical Underpinnings of Generic Thematic Analysis

Since generic styles of thematic analysis do not come with an inherent philosophical foundation, it is essential for any researcher to consider the philosophical assumptions that underpin their work. In particular, they need to consider their assumptions about *ontology* – the nature of the reality they are investigating – and *epistemology* – what it is possible to know about that reality. With reference to the Template Analysis style of thematic analysis, we have found it useful to classify positions according to whether they adopt a realist or relativist ontology, and a realist or constructivist epistemology (King & Brooks, 2017). We feel this can helpfully apply to generic thematic analysis more widely. Any typology of positions inevitably presents clear boundaries where in fact there is blurring and overlap; with that warning in mind, we suggest four broad categories of philosophical position: qualitative neo-positivist, limited realist, contextualist and radical constructionist. In [Table 14.1](#) we summarise the ontological and epistemological stance of each of these and

highlight key issues which need to be considered in utilising a generic form of thematic analysis from each position.

**Table 14.1 Different philosophical positions for research and their implications for the use of generic styles of thematic analysis**

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| <i>Philosophical position</i> | <i>Ontology</i>                  | <i>Epistemology</i>       | <i>Implications for use of generic thematic analysis</i>                                                                                                                                                                                                                                                                                                                     |
|-------------------------------|----------------------------------|---------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Neo-positivism                | Realist                          | Realist                   | Seeks to build or test theory, minimising impact of researcher subjectivity<br>Use of independent coders to verify accuracy of themes<br>May use strong, theory-linked a priori themes                                                                                                                                                                                       |
| Limited realism               | Realist                          | Constructivist/relativist | Seeks to develop an account that is credible and potentially transferable, while recognising conclusions will always be tentative<br>Often uses a priori themes informed by theory or evaluation criteria<br>Quality checks to stimulate critical thinking, specific to needs of particular study<br>Reflexivity in analysis important, to go beyond researcher subjectivity |
| Contextualism                 | Relativist<br>(or indeterminate) | Constructivist/relativist | Seeks to understand participants' meaning-making within the specific research context<br>Focus on induction and emergent themes; highly tentative use of a priori themes (if at all)<br>Reflexivity: researcher subjectivity integral to whole process                                                                                                                       |
| Radical constructionism       | Relativist                       | Strongly relativist       | Seeks to critically examine how the phenomena of organisational life are constructed, including how organisational research itself constructs knowledge<br>Scepticism about any quality criteria in analysis<br>Focus on themes as aspects of discursive construction rather than of direct experience                                                                       |

Source: adapted from King & Brooks, 2017

## Assuring Quality in Thematic Analysis

There is an extensive literature on quality in qualitative research, much of it focusing strongly on analysis (e.g. Symon & Cassell, 2012; Tracy, 2010; Yardley, 2008). It is beyond the scope of the present chapter to review this literature in detail. However, we will provide some brief thoughts on the relationship between quality assurance and philosophical position, before moving on to highlight some of the main quality procedures used in various forms of thematic analysis.

The diversity of philosophical positions underpinning qualitative organisational research inevitably means there can be no universal prescriptions for quality assurance. We agree with previous authors such as Johnson, Buehring, Cassell and Symon (2006) that the approach to quality needs to be contingent upon the philosophical roots of a study. For example, with reference to [Table 14.1](#), while a case can be made for calculating statistical inter-coder agreement in a neo-positivist study, with a strong realist ontology *and* epistemology, it would make no sense at all in radical constructionist study. The starting point for any decisions about quality assurance in thematic analysis must therefore be a consideration of the implications of the study's ontological and epistemological stance.

There are numerous strategies used to ensure the quality of thematic analysis, most of which can be adapted for most philosophical positions. We will briefly discuss three of them here; *inter-coder comparison* (in various forms), *respondent feedback* and *audit trails*. Starting with the first of these, researchers who use inter-coder comparisons do so with the involvement of different types of coder and at different stages in the analysis. Independent coding may be carried out between members of the research team, and/or with people outside the team who may be experts in the topic, the methodology, or both. It may take place at a very early stage

to see what preliminary codes and potential themes both parties identify. Alternatively, it may be conducted once a first version of a coding framework has been developed, to test it out. In realist approaches, such comparisons will be seen as addressing the accuracy of coding to themes and/or clarity of their definitions. In contrast, relativist approaches will normally see inter-coder comparisons as a way to stimulate fresh perspectives on the data and to support the researcher(s)' reflexivity.

Participant feedback refers to any attempt to involve some or all of a study's participants in the analysis process. This can involve anything from 'blind' checking of a sample of coding up to highly participatory approaches where participants are truly co-researchers. We prefer this term to 'member checking' as that sounds too limited in scope or 'respondent validation' which implies that participants can objectively certify whether a researcher's interpretation is 'correct'. This latter kind of claim only makes sense from a qualitative neo-positivist position (see [Table 14.1](#)), and even here researchers need to be aware that the idea of validation is a complex one. The participant's view of their experience is of necessity not the same as the external gaze of the researcher, however empathetic. Also, participants may be influenced by the desire to please the researcher, or alternately be unwilling to 'admit' to the validity of interpretations that they find unflattering. In most qualitative analysis, therefore, respondent feedback is seen as an additional source of information which enriches the analysis but is itself subject to critical reflection as much as the original data.

As well as ensuring that participant feedback is used in a manner congruent with a study's overall assumptions, it is vital to consider the ethical implications of its use. In some circumstances, it may be seen as ethically very positive, as a means of acknowledging participants as more than just a source of data. However, it may sometimes be ethically problematic – for instance, where it may require participants to re-visit difficult or painful experiences.

An audit trail is a record of how the analysis developed over the course of a study. It would normally include successive versions of the thematic framework developed in the study, noting changes to themes, their use and the way they are structured to relate to each other. Annotating such versions to capture the reasoning behind changes is advisable; such details are easily forgotten over the often extended time period needed to complete analysis. It can also be helpful to keep a research diary in which the researcher reflects on the ongoing research process and their place in it. Cross-referencing from this to the audit trail can help build a strongly reflexive understanding of the analysis. Because most forms of thematic analysis have a fair degree of structure to their procedures and practices, keeping an audit trail should be relatively straightforward. For instance, in our writing about Template Analysis we always encourage researchers to retain and keep notes on each iteration of their template (e.g. King & Brooks, 2017).

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## Using Thematic Analysis in Qualitative Organisational Research

Now we have introduced the distinction between generic and specific forms of thematic analysis and established key principles to ascertain and assure quality across a range of thematic analysis approaches, we will move on to look at some of the various generic approaches to thematic analysis used in organisational

research. There are, as we have noted, a number of different styles, and in this section, we will look at some of those more commonly used in organisational research. We will describe how to undertake thematic analysis using the example of one particular approach, Template Analysis (King & Brooks, 2017). We will then consider some other alternative approaches commonly used in qualitative organisational research: Braun and Clark's style of thematic analysis (Braun & Clark, 2006); Matrix Analysis (Nadin & Cassell, 2004); and Framework Analysis (Ritchie & Spencer, 1994). We will conclude with a critical comparison of these four styles of generic thematic analysis.

## Template Analysis

Template Analysis is a generic style of thematic analysis which has been widely used in organisational and management research as well as in many other disciplines, and applied to a broad range of different research topics (King, 2012; King & Brooks, 2017). As a generic thematic analysis style, Template Analysis is not wedded to a particular philosophical position, and has arguably been used from a wider variety of epistemological positions than other styles of thematic analysis (see Brooks et al., 2015, for a description of its use in three studies with quite different approaches).

All styles of thematic analysis include two core processes: *defining themes* and *organising themes* into some kind of structure that represents conceptual relationships between them (King & Brooks, 2017). While particular styles of thematic analysis may define themes and arrange structures in different ways, there are some steps in the coding process that are very similar across pretty much all of them. We will use Template Analysis as an example to guide the reader through the main procedural steps of analysis. However, there are certain features of the method that diverge from approaches, and we will highlight these shortly. Additionally, it is important to note that descriptions of how to undertake analysis should not be seen as prescriptive. The real strength of generic approaches to thematic analysis is that they provide structure to the task of undertaking analysis while allowing the analyst to adapt them to the needs of their particular study. This is certainly true of Template Analysis.

Let us identify first some of the features of Template Analysis which may not be common across all generic approaches to thematic analysis. Template Analysis involves the development of a *coding template*, often based on a subset of data, which is then applied to further data and revised and refined. Although there is an emphasis on hierarchical coding, Template Analysis does not (unlike some other approaches to thematic data analysis) suggest a particular set sequence of coding levels, and is flexible regarding the style and format of the coding template produced. This means that researchers using Template Analysis often develop particular themes more extensively, enabling them to capture the richest and most detailed aspects of their data. Some approaches to thematic analysis distinguish between descriptive and interpretive coding, whereas Template Analysis does not insist on such an explicit distinction: indeed King (2012) suggests that 'it is debatable whether there is ever such a clear distinction between [the two]' (p. 429). Template Analysis takes a similarly pragmatic approach to inductive versus deductive coding. Rather than insisting on coding using either a 'bottom up' approach (in which themes are derived inductively from the data) or a 'top down' approach (in

which themes are informed by previously determined concerns – either theoretical or practical), Template Analysis allows the use of either or both. In Template Analysis, it is permissible (although not obligatory) to define some themes in advance of coding (known as *a priori themes*). A priori themes are identified as potentially helpful and relevant to the analysis, by corresponding to key concepts and/or perspectives for the research. However, the number of a priori themes should usually be limited, and they should always be used tentatively, and redefined or removed if they do not prove useful.

The first step in Template Analysis is to *become familiar with the data* to be analysed. However, unlike some other approaches, Template Analysis does not require that the entire data set be read in full at this stage. Certainly, in a smaller study (perhaps with ten interview participants) it would be reasonable for the researcher to read through their data in full. However, in larger studies, it is recognised that this may be an excessively challenging and lengthy undertaking – in any case may not be possible in where data collection may be ongoing over some time and analysis planned concurrently with data collection. In a larger study, it would be reasonable for a researcher to familiarise themselves with a subset of the accounts to be analysed as a start.

Next, the researcher undertakes *preliminary coding* using the first item of data (an interview transcript, a set of diary entries or fieldnotes, and so on). Every section of the text that seems to offer something of relevance or contribute to understanding in relation to the research question is highlighted, and the researcher makes a note in the margin summing up what it is that is of interest here. Short code titles should be used to the content of these notes. If a priori themes are being used, the researcher should have these listed on a separate sheet to which they can easily refer. Sections of the text that appear to relate to a priori themes are also highlighted, and indexed to the relevant theme. *Parallel coding* (classifying the same segment of text under two different codes) is permissible. At this stage, researchers are advised to code inclusively – codes which turn out not to be relevant can always be discarded at a later point.

Although in most styles of thematic analysis it is common to carry out preliminary coding on the full data set before moving to subsequent stages, in Template Analysis it is normal to carry out the early stages of analysis a subset of the data. The aim is to produce an initial version of the template, which can then be used to code subsequent data and modified in the light of it. The number of transcripts (or other data items) that need to be included in the initial analysis will vary from study to study. As a rule, the more diverse the perspectives and experiences of the sample, the more data will be needed in the initial sub-sample. We would always recommend that the initial sample is as diverse as possible; failure to do this can lead to a ‘skewed’ initial template which does not work well at later stages of the analysis process and which may even need discarding entirely.

The next step towards the initial template is known as *clustering*. Here, the preliminary codes that represent emerging potential themes, plus any a priori themes that have proved useful, are grouped together into meaningful clusters. Redundancies amongst them are removed and themes defined more clearly. Hierarchical relationships between themes may begin to be identified, but it is important not to rush to ‘tidy up’ the clusters; experimenting with different ways of capturing the data and relating themes to each other will pay dividends in terms of a robust and nuanced interpretation. We find it helpful to use Post-It notes to try

out different ways of clustering themes, with theme names and line numbers indexing text written on them. Of course, researchers may use whatever means they find useful to help maintain an open, creative attitude to the task, which could include the use of specialist qualitative analysis software (CAQDAS: Computer Assisted Qualitative Data Analysis Software) such as NVivo, Atlas. ti, MAXQDA and many others.

Once the researcher is confident that their clusters are providing a good representation of the sense they are making of the data, analysis moves on to the stage of developing the initial template. This will certainly involve establishing hierarchical relationships between themes (with narrower themes nested within broader ones) and may also include lateral relationships across clusters. Sometimes, certain themes may pervade much of the data, cross-cutting many or sometimes all of the other distinct thematic clusters: these are referred to as *integrative themes*. While integrative themes are not as widely used (or even permissible) in many other approaches to analysis, identifying themes as integrative rather than treating them simply as another top-level theme can usefully draw attention to ways in which some themes may operate as ‘undercurrents running through participants accounts; often, perhaps, not addressed explicitly but very apparent to the careful reader’ (King, 2012, p. 432). In our own work, when we undertook an evaluation of a service providing end of life care in the home environment, we identified the perceived uniqueness of the service as an integrative theme: seeing the service as unique and special was an undercurrent pervading all other themes identified, indicating respondents’ typical stance towards the service (Brooks & King, 2014).

Once an initial template has been constructed, the researcher's next task is to apply it to further data, and thereby *modify and develop the template*. The researcher works systematically through the rest of their data, identifying those sections of text that contribute to addressing their research question, marking the text with one (or more) appropriate thematic from their initial template. Where data of interest are not captured by existing themes on the initial template – either because the data is not a ready ‘fit’ or because there is no theme representing this aspect of the data at all – modification of the template is undertaken. Necessary modifications may include inserting new themes, redefining existing themes, or deleting themes entirely where it becomes apparent they are redundant. Rather than reorganising the template after examining each new account, it is common to ‘group’ accounts and to work through these noting possible revisions before constructing an updated template. For example, in a study consisting of twenty interviews, a researcher might choose to design their initial template based on their preliminary coding of five transcripts, then design an initial template before working through a further five, modify the template, then proceed with another five transcripts and so on.

This iterative process of constructing and trying out successive versions of the template continues until the researcher is convinced that they have a template that provides a rich and comprehensive representation of their interpretation of the data. While such decisions will be unique to each particular piece of research (and in any case practical time and resource constraints will usually play some role in limiting the number of iterations possible), the most important point here is that all sections of the data relevant to the research question should be adequately captured by a *final template*. Once this *final version* has been constructed, the researcher then applies it to their full data set. The final template can be useful in structuring the writing

up of a piece of research and can provide a visual reference in dissemination, although it is important to keep in mind that constructing the template itself is not the end point of analysis. The researcher needs to use the coding to the final template to draw together their interpretation of their data. Template Analysis does not specify procedures for this *final interpretation* stage, as the requirements will vary according to the philosophical and/or methodological approach taken. Nevertheless, there are some common strategies that can prove useful. Searching for patterns in themes across cases is often useful – for example, do certain themes tend to dominate (or to be absent from) the accounts of certain types of participants? Prioritisation is essential – it will never be possible to talk about every theme at every level of hierarchy; even if it were, the result would be a report that lacked focus and was drowning in detail. Themes (or groups of themes) that clearly address the research question and feature strongly in participants' accounts are likely to warrant close consideration. Note that simple frequency counts should never be seen as meaningful in and of themselves; what they can do is draw the researcher's attention to interesting issues to explore further in their data.

Appendix 1 provides an example of a published study that utilises Template Analysis.

## Braun and Clarke's Style of Thematic Analysis

In an article that has become a benchmark paper, psychologists Virginia Braun and Victoria Clarke (2006) present an accessible and well delineated version of thematic analysis. Their approach is widely referenced in psychology generally and beyond, including in the field of organisational research. Braun and Clarke describe a six-step procedure for undertaking analysis, but are clear that what they provide are suggestions for practice rather than a set of fixed rules. They emphasise that analysis is a recursive rather than a linear process, and that the six phases they describe should be seen as basic precepts to guide researchers. The onus then is on researchers themselves to reflect on how best to apply these to fit their own research question and their data.

According to Braun and Clarke (2006), a researcher should be clear from the outset about what type of analysis they are setting out to undertake, and the claims this will enable them to make in relation to their data set, be that a rich description of the entire data set or a detailed account of one particular aspect. Analysis may be *theoretical*, coding for a very specific research question and more explicitly driven by the researcher and their particular concerns. Alternatively, the research question can emerge through the coding process itself: coding can be *inductive* and driven by the data in a bottom up approach to analysis. Braun and Clarke additionally suggest that the focus of an analysis can either be on identifying explicit or what they term *semantic* themes, or on identifying themes at a more interpretative or *latent* level. Their view is that thematic analysis typically focuses exclusively or primarily on one or other of these options. They stipulate that consistency is key here: what matters is that researchers are explicit about their decisions and their definitions, and consistent about how they apply these in their analysis.

The six steps identified by Braun and Clarke are: (1) becoming familiar with the data; (2) generating initial codes from the data and starting to organise it into meaningful groups (*codes* are defined as a feature of

the data that seem interesting to the researcher: they differ from *themes* which represent broader units of analysis); (3) searching for themes (the end result of this stage of analysis is a collection of what Braun and Clarke term *candidate themes* and all data extracts coded to these); (4) reviewing themes (this involves review both at the level of the coded data extracts and at the higher thematic level to produce, at the end of this step, a *candidate thematic map*); (5) defining and naming themes (at the end of this phase, the researcher should be able to clearly define their themes by succinctly describing their scope and content); and finally (6) producing the report.

Appendix 2 provides an example of published work utilising Braun and Clarke's style of thematic analysis.

## Framework Analysis

Framework Analysis was developed by Ritchie and Spencer (1994) as a pragmatic approach to the analysis of qualitative data, particularly in applied social policy research. The authors sought to develop a method that was systematic enough to offer rigour and clarity in analysis, but retained flexibility to enable it to be adapted to different types of study. The kind of work in which they were engaged was almost always carried out in teams, so it was important that their method would facilitate team-working in analysis. They also had a strong commitment to an applied orientation that could produce answers for those commissioning social research. There are five main stages to the approach.

### Familiarisation with the data:

Researchers immerse themselves in the data: reading and re-reading transcripts and field notes, listening to recordings of interviews. For larger studies – or those with very tight deadlines – the team may select a sample of the data with which to familiarise themselves; care must be taken to ensure this is from a cross-section of organisational settings, participant types, time periods and so on. Notes should be taken of features of the data that strike researchers as being of interest, but there is no systematic coding at this stage.

### Identifying a framework:

On the basis of the work done at the previous stage, researchers develop a framework of themes and subthemes with which to code the full data set. A priori issues that informed the research aims will feed into the framework alongside those emerging from the content of the data. Researchers are advised to keep the framework (which is sometimes referred to as an 'index') relatively simple at this stage, as the contents of the main thematic categories will be elaborated in the latter stages. Commonly there are just two hierarchical levels of themes at this stage.

### Indexing:

Here the whole data set is coded (or 'indexed') to the framework developed at stage 2. New themes may be added to the framework at this stage, though the norm is that the framework will be well-developed before indexing starts.

**Charting:**

Indexed data are moved into 'charts' – essentially tables that cross-reference units of analysis (e.g. individuals, groups, organisations) against themes. The aim is not to simply cut and paste each relevant quote into the appropriate chart; rather, all the material relating to a particular theme for a particular participant (or other unit of analysis) is distilled into an analytical summary. Units of analysis should be displayed in the same order on each chart, to help facilitate 'eyeballing' of the emerging analysis to detect patterns of interest.

**Mapping and interpretation:**

At this stage, the analyst reviews the charts and all research notes made in the previous stages, looking for patterns in the data and identifying key insights that help address the original research questions. Ritchie and Spencer (1994) emphasise that there is a wide range of strategies available to carry out this task, and success relies on intuition and creativity as much as following procedures. Researchers may variously use activities such as defining concepts, mapping the range of phenomena, developing typologies and so on.

Framework Analysis has been used very extensively in health services research, though much less often in business, management and organisational research. Examples of its use in the latter setting include Gray et al.'s (2011) study of coaching for SME managers, Sturges' (2008) examination of career self-management, and Osgood's (2004) research into professionalism amongst early years practitioners. Unfortunately, none of the organisational research studies using Framework Analysis that we identified in the literature provided much detail of their analytic processes; researchers are advised to turn to social policy and health fields for more detailed accounts of this style of analysis in action (e.g. Gale et al., 2013; Ward et al., 2013).

## **Matrix Analysis**

Matrix Analysis (Nadin & Cassell, 2004) is based on the work of Miles and Huberman (1994; see also Miles et al., 2014), and centres on the use of different types of table (or 'matrix') to display and develop analysis across cases. There are many different ways in which matrices may be organised; for example, by time period, to trace chronological developments (e.g. Cassell, 1989), by organisational case examples (e.g. Mahmood-Yousuf et al., 2008) or by data collection method where multiple forms were used in one study (e.g. Kislov et al., 2012). It is common for one study to use several forms of matrix. Matrices tend to present the outcomes of coding at quite a broad, summary level, to enable the researcher – and indeed the reader – to step back and 'see the wood for the trees'. The style is therefore particularly useful for relatively large studies, especially where multiple cases (such as multiple organisations or job roles) need to be compared and contrasted. There is a risk that case-specific detail may be lost, though it is not uncommon for matrices to be used alongside more fine-grained forms of analysis; indeed, in their original chapter, Nadin and Cassell describe a study where they moved from Template Analysis to Matrix Analysis.

There are rather fewer studies in the literature which identify themselves as principally using Matrix Analysis than the other three styles we have described, though many more draw on some of the ideas initially

advocated by Miles and Huberman (1994) in how they organise their data. Articles which explicitly use Nadin and Cassell's (2004) formulation of Matrix Analysis include Leithold et al.'s (2016) study of new product development in SMEs, which utilised an analytic matrix strongly based on previous research. In contrast, Savage et al.'s (2013) study of logistics in Namibia derived its main analytic matrix in a much more bottom up manner, based on categories emerging from close reading of the interview data.

## Comparing Generic Styles of Thematic Analysis

Reading our descriptions above of four different versions of generic thematic analysis, it is very apparent that there is a good deal of overlap between them. As noted earlier, this is why we prefer to refer to 'styles' rather than 'types'. We argue that these are not distinct and discrete methods of analysis, but rather variations on a common set of key activities: identifying themes, coding data to them, organising them into some kind of structure and producing an interpretation of the data.

Looking at differences between the four styles, there is a clear distinction between Braun and Clarke's version and the other three. Template, Matrix and Framework analyses are all examples of what Crabtree and Miller (1992) call 'codebook' approaches, in which a coding structure is constructed from a mixture of a priori interests and initial exploration of the data, then refined and developed through further application to all the data. Template Analysis arguably emphasises the development of an initial structure from a sample of the data in a stronger manner than the other styles, highlighting the move from 'initial template' to 'developing the template' as a significant transition in the process. In contrast, Braun and Clarke's thematic analysis is typically carried out in a more 'bottom up' way throughout the analytic process, rather than focusing effort on the development of a 'codebook'.

Template Analysis tends to encourage a more fine-grained analysis than the other two 'codebook' styles, mainly through its encouragement of depth of coding – studies using Framework or Matrix analysis rarely code to more than three levels, while it is common for coding relating to the richest and most revealing aspects of the data to extend to four or more levels in Template Analysis. This encourages a high degree of attention to nuance and detail, but the price to pay can be a very complex coding structure and findings that can be difficult to manage in their extent. Indeed, for this reason, Nadin and Cassell (2004) argue for combining Template and Matrix approaches, and give an example of this in their definitive chapter.

The strongest similarity in styles is between Template and Framework Analysis; the sequence of recommended procedures has a good deal in common, though there are variations in emphasis and focus. Template Analysis places more emphasis on the process of developing the coding structure than Framework Analysis, and as we have seen, marks the production of the initial template as a key step. Conversely, Framework Analysis describes 'charting' and 'mapping' processes that are not essential to Template Analysis (though not in conflict with it). As also noted above, Template Analysis encourages greater depth of coding than Framework Analysis. These two styles evolved in parallel from around the early 1990s to address similar concerns for a flexible but structured approach to analysis in applied qualitative research. The differences

between them to a large degree reflect the different disciplinary areas in which they developed, as Brooks et al. (2015) discuss.

Given the overlaps between them, one might question whether there is much purpose to defining specific styles of thematic analysis. There is certainly a danger that when methods are packaged in distinct ways, they encourage researchers to be more concerned about following the procedures correctly than thinking through what is needed for their research. All the same, we feel there are good reasons for qualitative methodologists to offer particular styles of thematic analysis. They help clarify what some of the important choices are for researchers trying to design their own analytic strategy. This is especially true where there is a substantial body of published work that researchers can consult for examples, as is the case for the styles we have discussed (though somewhat less so for Matrix Analysis than the others). Distinct, identifiable styles also aid clarity of communication about analytic procedures, especially in refereed journal articles where often there is very little scope for detailed descriptions of method. Finally, our experience as teachers and supervisors of qualitative research is that it is helpful for novice researchers to have detailed guidelines for analysis that have been well-tested in practice.

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## Conclusion

There is a paradox regarding the place of generic thematic analysis in qualitative research. On the one hand, it continues to be widely used – for example, as we write, Braun and Clarke's (2006) article has received nearly 33,680 citations on Google Scholar. On the other, there is a paucity of critical discussion in the literature – especially in refereed journal articles, which remain the most important medium of publication in the social sciences. We agree with Braun and Clarke (2006) that this lack of critical scholarly attention reflects the relatively low status of thematic analysis, which (despite the advances brought about by their work and that of other authors we have cited here) is still perceptible. Much of the critique of thematic analysis is informal – we find it in offhand comments in conference presentations or everyday dialogue between academic researchers, where 'mere thematic analysis' is dismissed as simplistic, descriptive and philosophically or theoretically ungrounded. There are some critical points that are somewhat developed in the literature and we will attend to these below, before concluding with our view of the strengths of generic thematic analysis for qualitative organisational research.

## Proceduralism and Methodolatry

There has been a good deal of discussion of the notion of 'methodolatry' in qualitative research. The term goes back to at least the early 1990s, and refers to a fetishisation of the purity of methods with the implicit assumption that this will in some way guarantee good research. Relating specifically to qualitative research, Janesick (1994, p. 215) defines it as 'a preoccupation with selecting and defending methods to the exclusion of the actual substance of the story being told'. In relation to qualitative analysis, these concerns tend to focus on 'proceduralism', where analysts focus on meticulously following set procedures rather than responding

creatively and imaginatively to data. Because thematic analysis is intrinsically procedural, it is often the focus of such criticisms. Atkinson (2013), for example, laments the deadening effects of fixed formulae and procedures:

Worst of all is the endless, repetitive emphasis on *coding* data. As if ideas were going to emerge from mechanistic trudging through one's data and repeatedly coding it. (p. 58)

Chamberlain (2000) points to the danger of thematic analysis procedures amounting to little more than a descriptive content analysis that simply classifies and illustrates what participants have said with no interpretive depth. On a rather different tack, some advocates of thematic analysis (including the present authors; Brooks et al., 2015) have warned of the danger that researchers become over-concerned with perfecting their thematic structure, rather than seeing it as a means to the end of interpreting the data.

Concerns about proceduralism need to be taken seriously by those writing about and using various forms of thematic analysis. We have certainly seen examples where authors talk about procedures as if simply following them precisely will inevitably produce a successful analysis. However, while any approach that describes a sequence of steps or stages may be interpreted in a mechanistic way, all the authors cited above writing about styles of thematic analysis are explicit that this is not how their guidelines should be used. Equally, we can readily point to numerous good examples of published researching using any of the styles we have discussed that show appropriate flexibility and creativity in how analysis is conducted. There may well be a case for better teaching of thematic analysis, but we do not agree that the fact some people use it poorly means it is inherently flawed.

For those who remain convinced that procedural guidelines will always channel people away from creative and imaginative engagement with data, we would offer a parallel counter-argument. Researchers may choose to enter the analytic process without any procedures to guide them, but we contend that they would still have a procedure – in that they do a series of things in a particular order to understand and interpret their data. The danger when they do not use any system to guide them is that their 'procedure' is haphazard, unreflectively selective and near impossible to report, so that the reader gets little sense of how the researcher got to their destination other than perhaps a vague reference to 'immersing themselves in the data'. Our argument here is not that this kind of very open approach is necessarily wrong, any more than we accept that following procedural guidelines is wrong; it is simply that any strategy for analysis brings its own risks with it.

## Fragmentation of Accounts

A second important critique of thematic analysis is that it leads to a fragmentation of accounts, resulting in analysis that loses the context of the particular circumstances in which data were collected. There are a number of different concerns that lie behind this argument. One is focused on the interactional context, particularly in interviews. Silverman (2013), for example, maintains that the meaning in any segment of talk is bound up in the ongoing interaction between interviewee and interviewer; to remove thematically-coded extracts from the sequence of interaction will inevitably result in an impoverished interpretation. Related to this

point is the argument that lack of analytic attention to the interview as interaction results in the interviewer's part in the production of 'data' being neglected. Potter and Hepburn (2005) illustrate how participant quotes are commonly displayed without the inclusion of the interviewer's question. This can make the participant's talk appear to be an abstract statement of their position on the topic at hand, rather than a particular answer to a particular question.

Critiques of thematic analysis in terms of the loss of context, above all interactional context, mostly come from those adopting what we might describe as a language-based position: conversation, discourse or narrative analysis, generally from a constructionist position. This is understandable, as in such approaches the details of interaction and its sequence within a text are crucial. Silverman (2013) argues that attending to such matters is still important in other types of qualitative research, and we would agree. However, we would also stress that the process of narrative construction per se is not the main focus of all qualitative traditions – for example phenomenology, grounded theory or realist evaluation. We would argue that good thematic analysis takes notice of context by insisting that the interpretation of individual sections of the data is informed by an understanding of the text (such as an interview transcript) as a whole. Thus in coding a section of text to a theme, the researcher is not just considering that section in a vacuum but is making sense of it in the context of the participant's whole account.

A further concern about fragmentation is the potential to lose the holistic sense of individual participants' experiences in cross-case analysis. This is especially an issue for experiential approaches such as phenomenology and personal construct psychology. To an extent this is inevitable in any qualitative study with more than a few participants, but there are strategies that can mitigate the problem. One is to present selected case studies to illustrate different positions within the cross-case analysis, highlighting key themes within these cases. Another is to combine thematic analysis with other forms of analysis that retain the integrity of individual accounts; this kind of methodological pluralism is attracting growing interest in qualitative research (Frost et al., 2010).

## Strengths of Thematic Analysis

We argue that despite the critical points discussed above, thematic analysis has some important strengths to offer qualitative organisational research. First, it provides a useful balance of flexibility and structure for the analyst. As a generic method, with a variety of well-established styles to serve as a starting point, it enables researchers to adapt and develop analytic strategies that fit the needs of their studies. This includes ensuring that philosophical foundations and theoretical orientations are followed through in the detail of analytic procedures, as well as enabling analysis to achieve its desired outcomes. At the same time, the various styles of thematic analysis provide clear (but not rigid) sequences of procedures that can reduce the risk of finding oneself lost in the sheer volume of data that qualitative research produces.

Linked to that last point, thematic analysis can help researchers to see the wood for the trees; that is, to get a sense of what the main messages are in extensive and often complex data. As we mentioned earlier,

this ability does not need to be at the expense of retaining a sense of individual positions within the data. In addition, the growing literature on generic thematic analysis helps to provide a common language for sharing methodological insights and reflections, as well as disseminating the findings of such research to a wide audience.

In sum, thematic analysis remains a powerful and flexible tool that used appropriately, facilitates the kind of sensitive, nuanced examination of organisational phenomena that qualitative research seeks to achieve.

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## Appendix 1: An Example of Template Analysis (Radcliffe, 2013)

This example comes from an article by Laura Radcliffe, published in *Qualitative Research in Organizations and Management* (2013). Her main focus is an evaluation of the use of diaries as a data collection method in the study of how couples manage the complexities of work-life decision-making. Within this, she provides a substantial example of her own empirical work, including a thorough account of her use of Template Analysis to analyse the diary contents and accompanying interviews.

Radcliffe recruited a diverse sample of 24 heterosexual couples who each completed a diary over a period of 28 days. The diary took an 'event-contingent' form (Bolger et al., 2003); that is to say, participants completed an entry every time the target event occurred – in this case, an incident where there was a 'work-family conflict'. For each such incident, participants completed a semi-structured proforma structured around four broad questions: what the incident was, what they decided to do about it, how they arrived at this decision and what the outcome was. Before the start of the diary period, Radcliffe conducted dyadic in-depth interviews with each couple, to help her get to know them and their circumstances, and to explain what would be required in the diary task. After the diaries were completed, she carried out a telephone interview with each individual participant, checking their understanding of the research and exploring their reactions to participation.

Template Analysis was used to analyse the diary data. Radcliffe cites the utility of the approach for examining different perspectives on a phenomenon as one of the reasons for choosing it, as she needed to make comparisons within and between couples, and look at temporal patterns over the diary collection period. She used four a priori top-level themes, reflecting the focus of her research questions: type of conflict, decision made, reason for decision and outcome of decision. These may be seen as 'soft' a priori themes in that they represent quite loose foci for developing the template, rather than tightly-defined theory-driven 'hard' themes (King & Brooks, 2017).

In keeping with normal practice, Radcliffe developed her initial template on the basis of close analysis of a subset of her data – in her case the full diary data from both members of one couple. She describes adding new themes, and moving others within the template; for example, she added the theme *unofficial work agreements* to capture a form of support that she did not observe in her analysis to construct the initial template. In a late iteration of the template, she grouped together the themes *availability of support*,

*job requirements and expectations*, and *financial considerations* in a broad top-level theme of *enabling and constraining factors*. It is quite rare for journal article authors to provide such detail of template development beyond the initial version, and she is to be commended for helping the reader gain a grasp of this key aspect of Template Analysis. Even more useful, though, is her illustration of how she captured the temporal nature of her diary data. All too often this is not addressed in a very adequate way in thematic analysis of any kind. Radcliffe uses flow chart diagrams of each individual conflict, with each box capturing a distinct comment (or set of comments) in the diary as the episode unfolded. Key themes from the template are indexed on the charts at relevant places. This strategy enables her to make comparisons between participants in a couple or across time, and link these specific instances to the broader Template Analysis.

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## **Appendix 2: An Example of Braun and Clarke's Style of Thematic Analysis (Langenhan et al., 2013)**

Langenhan et al. (2013) used Braun and Clarke's (2006) style of thematic analysis to explore different stakeholder perspectives regarding the extent to which psychosocial risks are incorporated into strategic risk management practice at both the business and policy level. Langenhan et al. acknowledge 'risk' as being conceptualised rather differently in different contexts, but for the purposes of their own work, they draw on previous definitions identifying risk as 'an effect of uncertainty on objectives' (p. 87). They describe psychosocial risks as representing a new and emerging notion of 'risk' for organisations, relating to issues such as work-related stress, violence, bullying and harassment. According to Langenhan and her colleagues, managing psychosocial risks effectively alleviates many of the known negative consequences of stress which affect productivity, constitute a threat to the viability of organisations and have large implications for the national health and benefit costs to wider society. Strategic risk management, as understood by Langenhan et al., involves the identification, assessment and prioritisation of risks, followed by the allocation of resources to minimise, monitor and control the likelihood and consequences of these. Risks are therefore not necessarily eliminated: the focus is often rather on identifying risks most associated with negative outcomes and addressing and managing these. Stakeholders in this process are understood to be multiple and broadly defined.

Langenhan and colleagues used qualitative methods so that they could fully explore the varying understandings and application of this new and emerging concept, and they used the guidelines provided by Braun and Clarke (2006) to thematically analyse their data. They recruited fourteen participants, which included a range of stakeholders they considered as 'key' in relation to their research. Semi-structured interviews were conducted with four participants representing four different employer organisations, five 'experts' (with 'national or international experience, or knowledge of general and psychosocial risk in business and/or policy making'), three policy makers and two trade unionists.

Four main themes are identified: understanding of risk, understanding psychosocial risks, barriers and opportunities. Each theme includes subthemes, and succinct descriptions of each subtheme are included in

the article.

Langenhan et al.'s article presents some useful insights for those working with the relatively new notion of psychosocial risk in the field of risk management. They suggest their findings reflect a need to close the gap between policy and practice in relation to psychosocial risk management, and that erroneous and inaccurate understandings of psychosocial risk often mean that management of such risks are a low priority for organisations. Their use of Braun and Clarke's style of thematic analysis evidently facilitated the extraction of key themes related to the topic which are each individually elucidated and linked into a convincing overarching narrative, effectively evidenced by participant quotes.

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