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Series Foreword

Qualitative approaches have become accepted and indeed embraced as empirical methods within the social sciences, as scholars have realized that many of the phenomena in which we are interested are complex and require deep inner reflection and equally penetrating examination. Quantitative approaches often cannot capture such phenomena well through their standard methods (e.g., self-report measures), so qualitative designs using interviews and other in-depth data-gathering procedures offer exciting, nimble, and useful research approaches.

Indeed, the number and variety of qualitative approaches that have been developed is remarkable. We remember Bill Stiles saying (quoting Chairman Mao) at one meeting about methods, “Let a hundred flowers bloom,” indicating that there are many appropriate methods for addressing research questions. In this series, we celebrate this diversity (hence, the cover design of flowers).

The question for many of us, though, has been how to decide among approaches and how to learn the different methods. Many prior descriptions of the various qualitative methods have not provided clear enough descriptions of the methods, making it difficult for novice researchers to learn how to use them. Thus, those interested in learning about and pursuing qualitative research need crisp and thorough descriptions of these approaches, with lots of examples to illustrate the method, so that readers can grasp how to use the methods.

The purpose of this series of books, then, is to present a range of qualitative approaches that seemed most exciting and illustrative of the range of methods

appropriate for social science research. We asked leading experts in qualitative methods to contribute to the series, and to our delight, they accepted our invitations. Through this series, readers have the opportunity to learn qualitative research methods from those who developed the methods and/or who have been using them successfully for years.

We asked the authors of each book to provide context for the method, including a rationale, situating the method within the qualitative tradition, describing the method's philosophical and epistemological background, and noting the key features of the method. We then asked them to describe in detail the steps of the method, including the research team, sampling, biases and expectations, data collection, data analysis, and variations on the method. We also asked authors to provide tips for the research process and for writing a manuscript emerging from a study that used the method. Finally, we asked authors to reflect on the methodological integrity of the approach, along with the benefits and limitations of the particular method.

This series of books can be used in several different ways. Instructors teaching courses in qualitative research could use the whole series, presenting one method at a time to expose students to a range of qualitative methods. Alternatively, instructors could choose to focus on just a few approaches, as depicted in specific books, supplementing the books with examples from studies that have been published using the approaches, and providing experiential exercises to help students get started using the approaches. Other researchers will just use one book as they strive to master one qualitative method.

Terry and Hayfield's book on a reflexive approach to thematic analysis provides a clear description of how to construct "situated truth" from qualitative data. The authors emphasize that this approach is a method (i.e., a flexible tool to fit the needs of a specific project) rather than a methodology (i.e., including a theoretical framework). They celebrate the idea of flexibility, subjectivity, and going beyond mere summaries of the data to deep understandings of the underlying structures. The method requires extensive engagement with the data and consistent efforts to check and think about analytic understandings. The book is designed for both beginners and experts, bringing the method to life with extensive tips, figures, and exhibits.

—*Clara E. Hill and Sarah Knox*

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CONCEPTUAL FOUNDATIONS OF THEMATIC ANALYSIS

Over the last decade, thematic analysis (TA) has become an increasingly popular way of engaging with qualitative data. TA is highly cited as an analytic method of choice for many, not only within psychology but also across a wide range of disciplines (Joffe, 2012; Terry et al., 2017). Researchers positioned within most theoretical frameworks can use TA to do justice to the piles of interview or focus group transcripts, qualitative survey responses, or other qualitative data they have generated. TA is a flexible analytical method that enables the researcher to construct themes—meaning-based patterns—to report their interpretation of a qualitative data set. It has proven utility for novice and experienced researchers alike, as can be seen in the vast numbers of theses, dissertations, papers, and reports that cite one version of TA or another as their primary analytic method. Among those who have been convinced of its merits, it is viewed as a rigorous, powerful, and yet “straight-forward” way of engaging with qualitative data.

Despite the newness of the method’s explosion in use, versions of TA have been around a long time. These versions were often just not described as TA at all, were poorly described, or were aligned with particular methodologies and thus already wedded to a theoretical framework. Consequently, over

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Essentials of Thematic Analysis, by G. Terry and N. Hayfield

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15 years ago, Braun and Clarke (2006) argued that TA was taken for granted, commonly deployed, and yet poorly described and delineated. The landscape has changed, though. Braun and Clarke's 2006 paper has now been cited many thousands of times on Google Scholar, and alongside other writing about TA, there is now a developing corpus of work that helps clarify the various ways TA can be used and understood (e.g., Braun & Clarke, 2012, 2019a; Braun et al., 2015, 2018, 2019; Clarke et al., 2015; Terry & Hayfield, 2020; Terry et al., 2017).

What has become clear through the work of Braun, Clarke, and their colleagues is that there is more than one expression of TA, something we discuss in more detail later in this chapter and in Chapter 6. Although Braun and Clarke's (2006) seminal paper is popular, it speaks about a particular type of TA—what they have since referred to as *reflexive* TA (Braun & Clarke, 2019a; Braun et al., 2018, 2019). Central to reflexive TA is the idea of *reflexivity*, or the importance of the researcher's interpretation of the data. Within reflexive TA, analysis occurs because of, rather than despite, the researcher's subjectivity—their values, backgrounds, decisions, and interests. In contrast to methods that attempt to create objective “distance” because of concerns about bias, reflexive TA is premised on the engagement of the researcher with their data, guided by their research question and theoretical orientations. In this text, we aim to contribute to increasing clarity regarding the shape and utility of reflexive TA.

Although TA more generally is no longer “poorly demarcated” (Braun & Clarke, 2006, p. 77), there is still work needed to ensure that the use of reflexive TA, and its ongoing evolution, continue to reflect its fundamental core values: (a) theoretical flexibility; (b) procedural focus on a systematic, ever-increasing, and rigorous engagement with data; (c) emphasis on the reflexive contribution of the researcher; and (d) framing of “themes” as multifaceted, conceptual, meaning-based patterns. We keep returning to these core values throughout this book because they are central to the doing of reflexive TA. However, along with Virginia Braun and Victoria Clarke, we do not view this method as strictly following a recipe or a set of “rules” (Braun et al., 2019). Reflexive TA is simply one way of thematizing qualitative data that we think has considerable value in the wider qualitative research conversation.

We draw on almost 30 years of combined experience to help shape this text and its focus. We were both students of Virginia Braun (Gareth) and Victoria Clarke (Nikki), directly benefiting from their input into our work and, more recently, collaborating with them on writing about reflexive TA. We have both worked extensively to support people using TA, teaching the approach through workshops, formal lectures, tutoring, one-to-one problem solving, and informal conversations. We have used it in our published work

and supported others' use of it in theirs. We hope that this text acts to supplement this ongoing support of people who are interested in TA—particularly its reflexive expression. We intend this text to give you a starting point, to act as a guide, but we will continually highlight that all research design comes with history, context, and decades of academic conversation and writing. Therefore, we recommend reading widely, and we point you in the direction of texts that have helped our research journeys, to some of the corpus of writing we referred to earlier in the chapter, and to exemplar studies listed in the Appendix.

In the rest of this chapter, we locate reflexive TA within the wider qualitative tradition and in relation to the theoretical underpinnings of knowledge production. We situate TA in relation to other modes of qualitative inquiry and emphasize some context for its use in the social sciences. The practicalities of the method are described in detail throughout the rest of the text using Braun and Clarke's (2006) six-phase approach. Before we get to the detail of how to do each phase of analysis, we delineate some often-overlooked elements that differentiate reflexive TA from other qualitative approaches.

A FLEXIBLE ANALYTICAL METHOD

One of the key features of reflexive TA is its status as a method rather than a methodology (Braun & Clarke, 2006; Braun et al., 2018). *Methods* are the tools we use to do the tasks of research, slotted into wider research design, depending on the needs of our projects (Nicholls, 2009). When an approach comes fully loaded with (sometimes taken-for-granted) theoretical frameworks that shape a researcher's thinking about a research problem, and combinations of tools that support and enable a qualitative research project, they are *methodologies*. Although reflexive TA has a number of assumptions or values associated with it, these are to ensure its utility across a wide range of possible uses (including with different data collection methods and any number of theoretical perspectives). Because of this emphasis on flexibility, understanding the project's theoretical perspective before getting to the detail of the method is key to success.

All research needs to be located within a theoretical orientation; understanding and selecting from the different theoretical frameworks (and the philosophies that underpin them—see Table 1.1) can be complex but should not be avoided. Even when a theoretical framework is taken for granted or assumed within a discipline, understanding your theoretical position is still essential. This does not mean knowing everything, but having a working knowledge of your research framework and its relationship to other frameworks is a great starting point.

TABLE 1.1. Theoretical Perspectives, Methodologies, and Reflexive TA

Theoretical perspective/ paradigm	Positivism	Postpositivism	Interpretivism/ constructivism	Radical/ critical	Poststructural
Example methodologies	Scientific method	Mixed methods Qualitative Descriptive	Phenomenology Hermeneutics Grounded theory Ethnography IPA	Critical social theory Feminist theory Indigenous frameworks	Discourse analysis New materialist Posthuman
Appropriateness of TA as an analytic method	Not appropriate	Realist versions of TA (see Chapter 6) and potentially critical realist versions appropriate	Realist, critical realist, and relativist versions of TA appropriate	Critical realist and relativist versions of TA appropriate	Relativist versions of TA and thematic discourse analysis both appropriate (see Chapter 6)

Note. IPA = interpretative phenomenological analysis; TA = thematic analysis.

Most people who have studied the social sciences (especially psychology) will be familiar with positivism, even if they have not heard it explicitly called that. Positivism is the key theoretical framework typically associated with scientific methods, and for many, quantification, hypothesis testing, and experimentation are indistinguishable from science overall. However, as you can see in Table 1.1, there is much more to knowledge production than the scientific method and certainly the type of thinking associated with positivism. It is worth considering that the philosophical underpinnings of each theoretical perspective inform the ways researchers look at the world, research, the nature of reality (ontology), theories of knowledge (epistemology), and the values of the researcher (axiology), even if they are not always explicitly acknowledged. Methodologies are often a product of these theoretical perspectives, allowing researchers a framework to think about their research question and the research process in a coherent fashion.

Historically, most qualitative research methodologies were developed (particularly within psychology) in opposition to positivism's dominance over knowledge production (Stainton Rogers & Willig, 2017). These developments highlighted different ways to engage with people and their perspectives on the world. Each move "away" from positivism comes with more complexity and a greater reliance on theory, philosophy, and interpretation to explore the phenomenon in question (and especially the "status" of people's talk and experiences). Certainly, there is no one right way to do research or produce knowledge, and your approach will depend on your research questions, your discipline, and the types of problems you are interested in addressing (Braun & Clarke, 2013; Grant & Giddings, 2002).

Some qualitative approaches are essentially a "methodological package," which provides inbuilt assumptions that can give researchers a clear direction on where to begin their journey to understanding. For instance, the analytical output of interpretative phenomenological analysis (IPA) is broadly thematic, working to describe patterns across (thematizing) and within (idiographic) interviews (Eatough & Smith, 2017). However, its theoretical foundations are inseparable from the procedures it uses (Smith et al., 2009). Indeed, IPA draws on multiple tools, including those needed for data collection (interviews, often repeated with the same participants), assumptions about samples (smaller participant numbers, homogeneity), and approaches to analysis (both idiographic and thematic—focusing analysis on individual participants and patterns across participants). These tools are explicitly wedded to its phenomenological theoretical focus that centers human experience and the particularities of individual lives and the interpretative lens needed by the researcher to help make sense of these

(Smith & Osborne, 2003). These inbuilt assumptions and packaging of tools are what you might expect from a methodology.

In contrast, when using reflexive TA, these decisions or expectations are not built into (or assumed within) the method. Instead, TA is simply a tool for qualitative data analysis. This does not mean that TA is atheoretical, rather that it was primarily designed to be theoretically flexible, usable as an analytic method across a variety of theoretical perspectives (Braun & Clarke, 2006; Terry et al., 2017). However, sometimes reflexive TA becomes aligned with particular frameworks. Historically, this has been phenomenological research, but more recently, people have assumed TA is “just a postpositivist method.” These are certainly not the only theoretical frameworks within which TA can be used! The one caveat here would be positivist-informed research; the expectations and assumptions within positivism immediately clash with the core values of reflexive TA, especially its theoretical flexibility. Importantly, this flexibility means that researchers need to make well-informed choices and build reflexive TA into their research design—with TA akin to a single jigsaw piece in a puzzle. Without the other pieces surrounding it, its value is limited.

Reflexive TA's flexibility means it becomes important for the researcher(s) to identify their theoretical orientation because this will define the way TA is used. Unlike the wider, established theoretical perspectives referred to in Table 1.1, these possibilities tap into the core questions one would need to think about in terms of their theoretical framing. These positions should also be viewed as sitting on a continuum (Madill et al., 2018; Terry et al., 2017), rather than strictly polarized dichotomies. We flesh out these ideas with more detail and examples in Chapter 6.

The researcher could take up a position anywhere along this continuum, depending on the research topic in question and the focus of the researcher. For instance, researchers wanting to explore people's first-person descriptions of a phenomenon would find an *experiential* orientation most valuable. For others interested in the social structures that produce, enable, and constrain experience, a *critical* orientation might be relevant. While both could involve generating data from people's responses to questions of one kind or another, the analytical orientation would shape how these data were interpreted and reported.

Another question relates to the view of reality that the researcher applies to the data (their choice of ontology). For some, a *realist* position—where people's words are understood to provide direct access to participants' social, psychological, and physical reality—might drive the project (see Chapter 6 for an example). In other projects, a *relativist* position might be taken. Here, the ways participants' words draw on shared meaning-making tools (i.e., discourses) and help (re)produce particular realities within a given culture