

Clustering Emergent Themes in Interpretative Phenomenological Analysis (IPA): A Proposed Decision-Making Framework for Novice Researchers

Wan Alif Haikal Wan Hazuki, Mohammad Aziz Shah Mohamed Arip*

Department of Guidance and Counselling, Faculty of Human Development, Sultan Idris Education University

*Corresponding Author

DOI: <https://doi.org/10.47772/IJRISS.2026.100800295>

Received: 20 August 2026; Accepted: 25 August 2026; Published: 02 September 2026

ABSTRACT

Despite its growing popularity in the social sciences, the methods of clustering emergent themes into higher order themes has yet to be codified as a structured decision-making process in the original text of Interpretative Phenomenological Approach which outlines six different methods of clustering: numeration, contextualization, abstraction, subsumption, function, and polarization. This space is especially susceptible to analytic drift and to undocumented and inconsistent clustering decisions by novice researchers. This conceptual paper outlines a decision making framework consisting of six techniques organised into four phases: structural check, narrative test, conceptual test and dual-layered recognition, which draws on a systematic review of 20 peer-reviewed articles and a critical synthesis of the original clustering principles proposed by Smith et al. (2009). The framework is located within a continuum of extending the hermeneutic and idiographic commitments of IPA, maintaining the researchers' focus on the individual's narrative before advancing to a more abstract level of classification. The framework is demonstrated to reduce the chance of analytic drift for novice researchers and to provide a clear and traceable organization for research diaries. However, there are a number of limitations, such as the tension between the staged nature of the framework and the traditionally flexible nature of IPA, the assumption that there is a reasonably coherent narrative of each participant, and the fact that this paper's contribution is conceptual rather than empirical. The framework needs to be applied to empirical qualitative data and extended to multiperspectival designs and more disjointed narrative accounts in future research.

Keywords: Clustering, Decision-making, Framework, Interpretative Phenomenological Analysis, Novice researcher

INTRODUCTION

Interpretative Phenomenological Analysis (IPA) has gradually developed into an increasingly popular qualitative research method and has attracted many researchers in various fields (Pietkiewicz & Smith, 2014; Tuffour, 2017). The method was first used in health psychology by Jonathan A. Smith, and is respected for its epistemological stance of investigating the sense-making of critical life events (Alase, 2017; Tuffour, 2017). One of the key points of IPA is that it is participant-centred, which enables the researchers to study the inner world of the subjects inductively, without being limited in theory. (Alase, 2017; Tuffour, 2017). Since then, this methodology has gained popularity not only in health psychology but in many other areas of the social sciences, education, clinical psychology, nursing, and, more recently, Islamic studies research on religious experience, awareness and practice (Pietkiewicz & Smith, 2014). Although it can be a very rich experience to explore, the data analysis stage of IPA is known to be time consuming, labour intensive, cognitively and imaginatively demanding (Alase, 2017). One of the most important moments in this process is the

identification of the conceptual relationships, logical connections and similarities between the transcripts, in which the clustering of emergent themes into super-ordinate themes is a very delicate moment (Pietkiewicz & Smith, 2014). For experienced researchers the task is usually carried out through an 'understood' tacit 'sense of pattern recognition' which develops as they repeatedly engage with the non-linear, iterative nature of qualitative analysis, and which is not easy to teach explicitly but is assumed in most guidance on how to do IPA. By contrast, novice researchers are entering this stage without this "intuition" and are much more dependent on explicit procedure directions to determine when and how emergent themes link and group together. It is here that the current literature on the IPA is inadequate, as novice researchers are often left with a sense of confusion and overwhelmed when struggling to interpret the complex data when clustering (Alase, 2017), and at the same time trying to avoid letting their own prior understandings or presuppositions affect the authenticity of the participants' accounts. (Pietkiewicz & Smith, 2014). That is, the interpretive, non-mechanical nature that defines what makes clustering meaningful is also the feature that can make it off-puttingly hard for people who lack previous analytic experience to do with confidence. On top of that, there is limited explicit guidance in existing methodological literature on what method, of the various types of clustering methods namely numeration, contextualization, abstraction, subsumption, function, polarization, to use and which to choose (Bagnas & Choy, 2025; Nigbur & Chatfield, 2025), this means that novice researchers lack systematic and consistent guidance on their choices (Nigbur & Chatfield, 2025). To address this practical gap, the present conceptual methodological paper strives for a structured, procedural answer, instead of providing more general comments on the interpretive demands of IPA. This paper proposes that the decision logic involved in clustering should be made explicit, but not mechanized, so that it does not become an intuitive skill that needs to be learned by trial and error by novice researchers. The three main research goals of this paper are to describe and expand the procedural gap within current guidance on how to cluster emergent themes in IPA analysis, to suggest a decision-making framework to facilitate novice researchers systematically and consistently choosing the techniques for clustering emergent themes, and to discuss implications of the suggested framework in minimizing analytic drift and enhancing the documentation of IPA research.

The Problem Under-Specification in Ipa's Clustering Stage

Overview of Stages in the IPA Analysis Process

The Interpretative Phenomenological Analysis (IPA) study is a series of flexible, but structured, analytical stages that are designed to guide the study from descriptive encounters with raw text to highly interpretive conceptualizations (Pietkiewicz & Smith, 2014). The process usually starts with verbatim transcription of audio recorded interviews which is an essential first step that will facilitate early interpretative engagement with the meaning-making of the participants (Willis & Harvey, 2025). After transcription, researchers engage with the data by repeated and close reading of the transcripts, sometimes supplemented by listening to the actual audio data to pick up paralinguistic and emotional features (Blair et al., 2024; Willis & Harvey, 2025). This deep engagement evolves into exploratory, line-by-line coding, in which the researchers make descriptive, linguistic and conceptual comments in the margins of the transcripts (Anestis et al., 2023; Baker, 2026). The next step is to take these rich, exploratory comments and develop them into short phrases that are more abstract, but still tied to the participant's specific account (Pietkiewicz & Smith, 2014; Somers et al., 2024).

After the emergent themes have been created for a transcript, the researcher needs to seek out linkages, patterns, and qualities of resonance between the themes, and organize these themes into larger conceptual clusters that are called superordinate themes (Pietkiewicz & Smith, 2014; Somers et al., 2024). This idiographic process is repeated for each transcript in multi-case studies before a cross-case analysis is conducted to determine patterns of convergence and divergence across all cases (Anestis et al., 2023; Foyston et al., 2025). When considered as a whole, the series of steps takes the researcher increasingly away from the raw transcript and toward an interpretation of the participant's experience. The transcription, immersion and line-by-line coding are largely descriptive and remain faithful to the participant's own words. Clustering emergent themes into superordinate themes is not just in degree, but also in kind; the point at which the researcher must impose some conceptual structure on the data, deciding what pieces of meaning go together,

and why. This is also, notably, the point where the guidance for IPA is least clear on the specifics of how that decision making will occur.

The Problem of Under-Specification in the Clustering Stage

Although the clustering stage is crucial to the success of the IPA, it is often criticized for being under-specified, and there is not enough information for novice researchers (Nigbur & Chatfield, 2025). There are various handbooks that refer to different clustering strategies, including numeration (counting how often a theme is supported in the account), contextualization (grouping by narrative or contextual theme), abstraction (grouping by conceptual similarity), subsumption (moving an emerging theme up to a broader theme), function (grouping by the psychological function or narrative function of the theme), and polarization (grouping by the opposition of themes), but none of these handbooks explicitly provides the decision logic and sequential rules for choosing which of these techniques to use (Bagnas & Choy, 2025; Nigbur & Chatfield, 2025). In practice, this means that the researchers are provided with a set of moves to choose from, but cannot know which move is appropriate in which situation. The standard guidelines provide a flexible set of suggestions, not a standardized, step-by-step system, so the actual process of theme clustering may be experienced as a trial and error process (Nigbur & Chatfield, 2025; Tuffour, 2017). Faced with this ambiguity, some researchers resort to arbitrary numerical thresholds, such as requiring an emergent theme to appear in at least half of the transcripts before it is categorized as a recurrent superordinate theme (McGarva-Collins et al., 2022). Such thresholds can seem like a solution, but they can be seen as a counting exercise in place of a gap in the procedure, which does not sit well with IPA's idiographic commitment to the particular, where the significance of a theme in IPA is not to be judged by its frequency of occurrence, but by its depth of meaning for the individual participant. This procedural gap creates several significant methodological risks for the novice researcher. The primary risk is analytic drift in which the analysis simply becomes a low level, descriptive, thematic summary lacking hermeneutic-phenomenological depth (McKenzie, 2026; Tuffour, 2017). This descriptive collapse is due to the fact that when there are no rules to control the interpretive complexity, the pre-existing professional or theoretical framework can penetrate the analysis before the participants' voices, making it difficult to hear the participants (Motta & Larkin, 2023; Tuffour, 2017). Another problem with under-specification is that different researchers can use different, but not documented, cognitive steps to the same data, leading to inconsistencies in the studies, thus reducing transparency and dependability (Nigbur & Chatfield, 2025; Tuffour, 2017). All of these risks indicate the same root cause, that is, if the reasons for clustering are not made clear, they are not visible to others. This unstructured approach makes it hard to set up a clear and traceable evidence trail. (Baker, 2026; Nigbur & Chatfield, 2025). If the logical links between the original raw text, the emergent themes and the final superordinate themes are not clearly documented, the trustworthiness of the qualitative findings is undermined, which leads to criticisms that many IPA studies are poorly interpreted (Baker, 2026; Tuffour, 2017).

Existing Literature on Theme Clustering in Ipa

While a number of strategies have been offered to deal with the lack of explicit procedural guidance in the intermediate stages of IPA, none has been proposed that directly fills the gap identified in the previous section. A prominent contribution comes from Larkin et al. (2019), who tackle the challenges of data synthesis in multiperspectival designs. They notice that it is more difficult to recognize patterns, connections and differences between different perspective groups, dyads or systems than to extract common superordinate themes from a single homogeneous sample (Larkin et al., 2019). To assist researchers, they suggest five analysis strategies for complex thematic development: consensus or conceptual overlap, conflicts of perspective, reciprocity of concepts, paths of meaning, and overarching lines of argument. This framework provides a helpful conceptual vocabulary for relational and systemic synthesis, but it is not about sequential decision logic for typical, one-perspective studies.. In other words, it addresses a different but related problem; an inexperienced researcher using common designs is still not provided with a direct procedural step-by-step guide for when to use techniques like abstraction or polarization, or any other clustering technique. A second, related effort comes from Nigbur and Chatfield (2025), whose focus shifts from clustering itself to the stage that follows it, theme naming and categorization. They maintain that, while there are many resources available to help readers and notators get started in the early stages of reading and notation, very little explicit procedural

information exists regarding the assignment of names or labels to emergent and superordinate themes (Nigbur & Chatfield, 2025). They draw on general qualitative and phenomenological texts and suggest that theme names should answer the experiential research question, be based on a real experience, and should form a unified story. The recommendations enhance the communicative and expressive nature of the finished themes, but that is the very point at which they are not useful for present purposes; to name a theme well requires that it has been clustered correctly. This paper is therefore not directly addressing the structural issue, but building on it, as in the case of Nigbur and Chatfield.

A third type of work documents the practice of specific clustering techniques in empirical studies, providing a more detailed account of how clustering looks in practice, if not why certain methods were adopted. Bagnas and Choy (2025), for example, demonstrate the use of a structured dendrogram to cluster themes, explicitly applying four techniques: abstraction, defined as grouping themes by similarity, subsumption, elevating a theme to a broader category, polarization, grouping by difference, and contextualization, organizing themes around significant narrative settings.

Their study is an empirical example of these four techniques, but it is more of a localized example of the tools, and is not a step-by-step explanation of why and when one technique is better than another. Alase (2017) approaches the problem from an earlier point in the analytic process, proposing a generic three-cycle coding method to help novice researchers systematically condense lengthy participant responses into manageable statements. While this reduces some of the confusion surrounding early-stage data reduction, the method is optimized for condensing and extracting themes, not for providing the decision logic required to organize those themes, once extracted, into superordinate themes. Taken together, this body of literature reveals a consistent pattern rather than a set of unrelated gaps.

Each contribution strengthens a stage adjacent to clustering, cross-case synthesis (Larkin et al., 2019), theme naming (Nigbur & Chatfield, 2025), or early-stage data condensation (Alase, 2017), or illustrates clustering techniques in a single empirical setting (Bagnas & Choy, 2025), without ever isolating the clustering decision itself as a problem worth solving in its own right. This is likely to be the reason why the gap outlined in the previous section has remained, as existing scholarship has been able to circumvent the clustering stage rather than work through it directly. Novice researchers are then left to rely on their own and their own intuition to make decisions between numeration, contextualization, abstraction, subsumption, polarization and function, and this raises the possibility of analytic drift and descriptive collapse. This particular lack, which is systematic and is the basis of a verifiable choice among the six clustering options, is what makes the framework proposed later in this paper appropriate.

METHODOLOGY

Nature of the Paper

This paper is conceptual and methodological in nature, rather than empirical. This study differs from the traditional empirical studies that present new qualitative data, because it tackles a procedural ambiguity that has been identified in the previous sections, namely, the lack of explicit decision logic for clustering emergent themes into superordinate themes in Interpretative Phenomenological Analysis (IPA). The paper does not provide an additional empirical description of participant experience, but instead, offers a methodological contribution in the specific sense described in Section 3, it summarizes what has been learned from the existing literature on clustering techniques, and offers a structured, step-by-step decision making framework to address the gap that this literature leaves open. The rest of this section provides an explanation of the process used for identifying the supporting literature, as well as the process used for building the framework.

Literature Identification Strategy

To construct a comprehensive and representative base of literature on this methodological challenge, a systematic search strategy was implemented across several academic databases, namely Springer Nature Link, SAGE Publications, ScienceDirect, Taylor and Francis, ProQuest, and Wiley Online. Three articles that form

the core of IPA methodology were also retrieved, which were not included in the database search, but were found by supplementary hand-searching. Pietkiewicz and Smith (2014) as done in the journal *Czasopismo Psychologiczne – Psychological Journal*, which is issued locally by the Polish Psychological Association. Alase's (2017) article was published in the *International Journal of Education and Literacy Studies (IJELS)* by the Australian International Academic Centre (AIA Centre). Tuffour (2017) was published in the *Journal of Healthcare Communications*, an open access journal of iMedPub. This additional step created a more balanced sample of methodological sources that were essential for the IPA and not necessarily excluded because of the scope of the databases, which is recognised as a limitation in general systematic search practice. To ensure consistency of standard throughout the rest of the literature base, the same inclusion and exclusion criteria used above were applied to these three articles..

The following Boolean string was used for the search: ("interpretative phenomenological analysis" OR "interpretive phenomenological analysis" OR "IPA") AND ("theme clustering" OR "clustering emergent themes" OR "superordinate theme" OR "theme development" OR "abstraction" OR "subsumption" OR "polarization" OR "contextualization") AND ("qualitative research" OR "qualitative methodology" OR "novice researcher" OR "beginner researcher").

The articles were required to be peer-reviewed, in English, and to refer to the IPA data analysis process explicitly, rather than just mentioning IPA as a label without providing details of the process. Articles were excluded if they did not explicitly discuss IPA procedures, were published in languages other than English, were not peer-reviewed, such as blogs or opinion pieces, or were duplicates and preprints of items already in the collection. Screening was done in two stages, a first screening of titles and abstracts and a second screening of the remaining articles, which meant that the inclusion decision was not made solely based on the abstracts. An initial search returned 34 articles, of which 20 met the inclusion criteria and were retained for synthesis. The main document for this study was the original writing of IPA by Smith et al. (2009).

Framework Development Process

The proposed framework is not the product of the literature alone, nor of practical experience alone, but of the interaction between the two. The main theoretical underpinning for this is a critical synthesis of the theme clustering principles first formulated by Smith, et al. (2009), and the methodological literature of the present day that was examined in Section 3. These sources were used for conceptual definitions and structural distinctions of conceptualizing the six main clustering techniques, namely numeration, contextualization, abstraction, subsumption, function and polarization. These definitions were then synthesized into a practical, step-by-step heuristic based on the author's postgraduate study that reflects on the lived experiences of Muslim counsellors as they manage ethical dilemmas in their counselling sessions. This reflective element is not a criticism of the logic, which is firmly grounded in existing IPA methodology and is not a matter of personal taste.

PROPOSED FRAMEWORK

The proposed decision making process provides an auditable, systematic, and theoretically based heuristic for novice researchers to use in transitioning from a flat list of emergent themes to structured superordinate themes. Rather than leaving this transition to unstructured intuition, which, as discussed in Section 2, is precisely what leads to analytic drift, the framework organizes the six clustering techniques named descriptively by Smith et al. (2009), numeration, contextualization, abstraction, subsumption, function and polarization, into a staged, sequential decision-making procedure.

This sequencing is the framework's central contribution, where Smith et al. (2009) describe these techniques individually, they do not specify when a researcher should reach for one over another, or in what order these considerations should be worked through. The framework addresses this by breaking the clustering process into four phases: a structural check, a narrative test, a conceptual test, and a dual-layered recognition. Each phase poses an explicit question, so that the researcher is always working from a defined decision point rather than a general impression of what seems to fit.

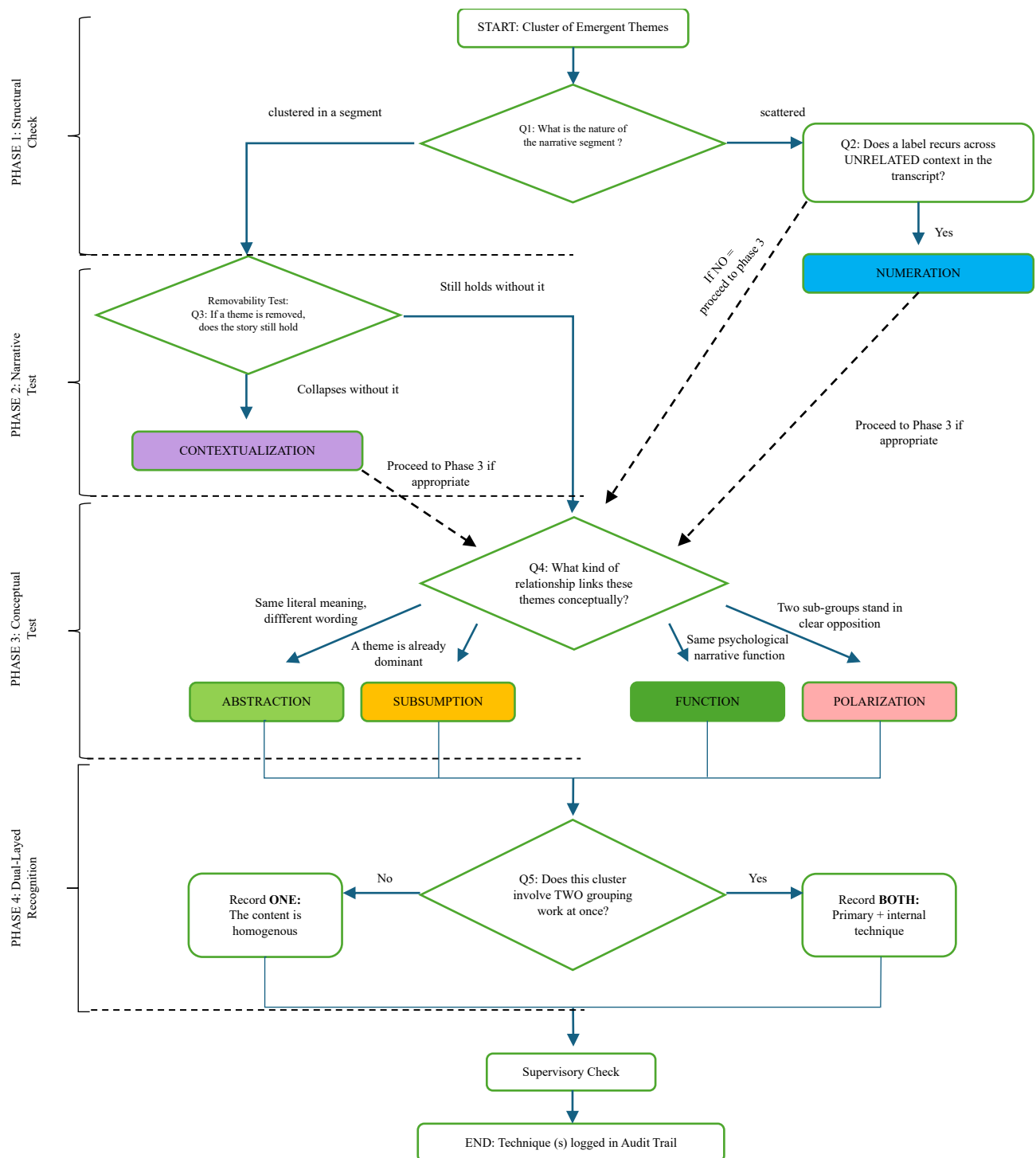


Figure 1. Decision-Making Flowchart for

Choosing Clustering Techniques in Interpretative Phenomenological Analysis (IPA)

Phase 1: Structural Check

The process starts with a structural examination of the distribution of emergent themes throughout the transcript. The first decision point (Q1) directs the researcher to review the structure of the data for each emergent theme which may be found in one narrative segment or throughout the transcript. If the theme is grouped within a segment, the researcher moves on to Phase 2, the narrative test. Meanwhile, where it is scattered, a second decision point (Q2) asks whether the theme label recurs across otherwise unrelated contexts. If it recurs across divergent contexts, the researcher applies numeration, recording how often the theme is supported across the participant's account (Smith et al., 2009), before proceeding to Phase 3 where

appropriate. If it does not recur in this way, numeration is skipped and the researcher moves directly to Phase Numeration is deliberately positioned as a starting marker rather than an end point. Some qualitative approaches over-rely on numerical thresholds as a substitute for interpretive judgment (McGarva-Collins et al., 2022), and this framework avoids that trap by treating frequency as one input among several, rather than as sufficient grounds for clustering on its own.

Phase 2: Narrative Test

Emergent themes that are clustered within a specific segment move to the narrative test. This phase applies a removability test (Q3), asking whether the participant's core story still holds together if the theme in question is removed from the cluster. For example, in a cluster containing a theme about the demands of working as a counsellor, a theme about the amount of time spent in session, and a theme about one's own mental health being affected, removing the first theme causes the narrative to collapse; questions such as what kind of work leads to spending so much time in session?, or what kind of work affects one's mental health in this way?, are left unanswered once that contextual theme is gone. Where removing a theme causes this kind of collapse, the theme is judged to be highly context-dependent, and the researcher selects contextualization, grouping emergent themes according to significant narrative, temporal, or environmental settings within the participant's account (Bagnas & Choy, 2025; Nigbur & Chatfield, 2025). Where the narrative still holds together without the theme in question, it is not carrying this kind of contextual weight, and the researcher proceeds directly to the conceptual test in Phase 3.

Phase 3: Conceptual Test

Themes that pass the structural and narrative checks are then subjected to a conceptual test. Here, the researcher considers the specific conceptual relationship linking the themes together (Q4), and the framework distinguishes four pathways based on established qualitative literature (Bagnas & Choy, 2025; Smith et al. 2009). Abstraction: Where emergent themes share a literal meaning but are expressed in different wording, they are grouped under a new, more abstract superordinate theme capturing their conceptual convergence (Bagnas & Choy, 2025; Nigbur & Chatfield, 2025). Subsumption: Where one emergent theme within the cluster is already dominant and carries substantial interpretive weight, it is elevated to serve as the superordinate theme itself, drawing related themes under its conceptual umbrella (Bagnas & Choy, 2025; Smith et al. 2009). Function: Where themes are linked because they perform the same psychological or narrative function within the participant's account, in a simpler way of saying, they are grouped by function (Larkin, Shaw, & Flowers, 2019). Polarization: Where emergent themes represent opposing psychological stances or conceptual dualities, they are held together under a single superordinate theme that preserves this lived tension, rather than resolving or smoothing it over (Bagnas & Choy, 2025; Smith et al. 2009). These four pathways function as primary techniques, each capable of unifying a cluster as a whole. None of the four carries automatic priority over the others, the researcher's task throughout the framework is to follow the logic and fit of the data at each decision point, not to default to a preferred technique.

Phase 4: Dual-Layered Recognition

The final phase addresses a difficulty novice researchers commonly encounter, namely emergent themes that appear to require more than one kind of grouping decision at once. The final decision point (Q5) asks whether a cluster requires, in addition to its primary technique, an internal technique, that is, a technique that organizes the emergent themes within the cluster itself, such as contextualization arranging themes according to narrative or chronological order. Where the cluster involves both a primary and an internal grouping operation at once, the researcher records both, for example, a cluster unified conceptually through abstraction, but internally organized according to the chronological sequence in which events occurred within the participant's account. However, where the cluster's content is homogenous and does not require this internal layer, only the primary technique is logged. This dual-layered option is not an ad hoc addition to the framework, Smith et al. (2009) themselves note that combining clustering techniques can produce a higher level of interpretation than applying a single technique alone, and Phase 4 formalizes that possibility as an explicit, recordable decision point rather than leaving it to be noticed or missed by chance. Once a clustering decision has passed through the relevant phases, the selected technique or techniques are logged in the audit trail, followed by a final

supervisory check to validate the credibility and trustworthiness of the interpretive decisions made (Sulaiman et al., 2025). This closing step is what gives the framework its auditability; every clustering decision can, in principle, be traced back to the specific question and answer that produced it, which is precisely the kind of documentation that Section 2 identified as missing from existing guidance.

DISCUSSION

The suggested framework directly tackles the issue of lack of sequential guidance in the foundational text of Smith et al. (2009). According to their original writing, Smith et al. (2009) describe the transition from emergent themes to superordinate themes as an intuitive process of looking for connections, but they do not provide a clear, step-by-step decision pathway. This critical stage is broken down into four stages: structural check, narrative test, conceptual test and dual-layered recognition, which would create a transparent and sequential pathway instead of the unstructured leap. The framework alters the way a researcher passes from one technique to another, not the techniques themselves; all six are already included in Smith et al. (2009). The framework makes these decisions explicit, making the exercise a visible and conceptually auditable analytical exercise, rather than one that has been tacit and intuitive. This structured pathway both aligns with, and extends, existing scholarly thinking on IPA theme clustering. The framework is firmly based on the core hermeneutic and idiographic principles of IPA, which is to ensure that the thematic development is anchored in the participant's original voice (Fischera et al., 2025; Liu et al., 2025). For example, Liu et al. (2025) suggest that qualitative data analysis be conducted in the hermeneutic circle, focusing on the interplay of parts and whole, which is not linear. This is taken into account in the design of the structural check and the narrative test in that they focus the researcher's attention on the context of individual statements before advancing to more abstract classification. The framework builds on the existing protocols by offering a single decision-making process for the six clustering techniques described by Smith et al. (2009); four of these techniques are primary for unifying a cluster (abstraction, subsumption, function, and polarization) and the remaining two are structural and narrative markers that precede the primary techniques (contextualization and numeration). Traditional IPA analysis typically proceeds through an iterative but unstructured reading of transcripts (Fischera et al., 2025), offering limited guidance on when to reach for one technique over another. These six techniques can be arranged in a sequence of decisions that provides a step-by-step procedure for novice researchers to follow when navigating through complex, multi-layered data sets without losing their use of the idiographic depth that the methodology relies on.

IMPLICATIONS

The proposed framework has clear methodological consequences for the development and training of novice researchers who are working with the interpretive challenges of qualitative data analysis. The first is that the structured decision tree helps to prevent an all-too-frequent problem: the depth of the inquiry is reduced to a shallow, descriptive thematic summary (Baker et al., 2022; Tuffour, 2017). Novice researchers are particularly prone to considering emergent themes as topics of conversation, instead of as phenomena that speak to personal meaning-making, as noted in introduction part (Nigbur & Chatfield, 2025; Tuffour, 2017). The framework contains clear, step-by-step criteria at every decision point, which will help to minimise this descriptive collapse. The flowchart is intended to reduce, not eliminate, the risk of analytic drift, so it is important to be specific about what this means and does not mean. It serves as a scaffolding mechanism for the interpretative decision-making process, maintaining a systematic approach to the process of clustering emergent themes while also allowing for the continued development of the researcher's own analytical intuition (Nigbur & Chatfield, 2025; Smith et al. 2009). Second, the framework enhances the quality of qualitative documentation by modifying the use of a research diary or reflexive log by novice researchers. A reflective log is a standard qualitative practice that helps novices to document their assumptions, to be mindful of potential bias and to bracket their preconceptions during analysis (Baker et al., 2022; Foyston et al., 2025). In practice, however, if there are no conceptual benchmarks to ground these entries, a novice's research diary may remain ambiguous and challenging to audit, usually consisting of just a comment that some emergent themes were lumped together because they appeared to be related. The framework responds to this by defining each decision point (Q1-Q5) as a fixed point for a researcher to cite. A novice researcher does not need to make an unsupported claim, but can simply state that the removability test in Phase 2 was sufficient to warrant the selection of contextualization or that the conceptual test in Phase 3 warranted the selection of subsumption

over abstraction. In essence, the framework provides the research diary with something tangible to look back on, instead of a decision the researcher may not be able to fully recreate. This traceability enables peer reviewers, academic supervisors and external auditors to trace the exact logic from the raw participant transcripts to the final superordinate themes (Baker et al., 2022; Foyston et al., 2025), making this process of reflective writing more aligned with structured logic of decision making and enhancing the rigor, transparency, and dependability of novice-led qualitative research.

LIMITATIONS

The proposed decision-making framework provides a structured approach for theme clustering, but there are some considerations to note. There is a conceptual conflict between the sequential nature of a flowchart and the essentially non-prescriptive and flexible nature of IPA (Pietkiewicz & Smith, 2014). A sequential decision tree can be interpreted as being overly mechanistic and limiting the interpretive freedom and creative intuition that are important in phenomenological research (Pietkiewicz & Smith, 2014; Tuffour, 2017). This is precisely why the framework has been framed throughout this paper as a heuristic compass rather than a strict set of prescriptive rules, it is intended to orient a novice researcher's judgment, not substitute for it. One of the related limitations is the requirement for narrative continuity, especially in the narrative and conceptual tests. This dependence is based on the reasonable assumption that the participants' transcripts are verbally and narratively articulate. In research settings where participants have cognitive, communicative, or developmental challenges, their experiences can be extremely fragmented (Diller & Mehta, 2025) and the application of narrative dependent decision points to their transcripts may be less direct, and require considerable adaptation before it can be confidently applied in those settings. In addition to these two conceptual dilemmas, the framework is limited like most paper-based ones at this stage of development. The proposed framework has not yet been tested with real qualitative research data sets, thus the practical utility and usability for novice researchers is not yet confirmed but rather assumed for this conceptual and methodological paper. The framework is also designed specifically for standard, single-perspective qualitative studies, and does not directly address complex multiperspectival designs involving multiple distinct participant groups or dyads (Larkin et al., 2019), which require additional analytical and systemic considerations beyond its current scope. Thirdly, IPA is a method that is inherently subjective and the researcher's interpretive judgment still plays a role in determining the specific decision points within the flowchart, which may lead to different clustering decisions among different analysts who have the same set of emergent themes (Tuffour, 2017). In other way of saying, different analysts working with the same set of emergent themes might still arrive at different clustering decisions. This last point is worth connecting back to the claim made earlier in this paper, the framework is designed to minimize analytic drift, not to remove interpretive judgment from the process altogether, and this limitation is simply the other side of that same design choice. These limitations point to several valuable directions for future methodological research. Most importantly, future studies should empirically test and validate this framework by applying it to actual qualitative IPA datasets, evaluating the dependability, credibility, and inter-rater agreement of the resulting clustering decisions (Alase, 2017; Bagnas & Choy, 2025). Future work might also explore adapting the framework's decision points to accommodate multiperspectival designs (Larkin et al., 2019), or tailoring the narrative test to support participants who communicate through fragmented or non-linear narrative structures (Diller & Mehta, 2025). Extending the framework along these lines would allow qualitative methodologists to build on its current contribution while addressing the boundaries identified here. The final section of this paper now turns to summarizing the paper's core arguments and offering concluding reflections on the proposed framework.

CONCLUSION

This paper set out to address a specific largely unexamined gap in Interpretative Phenomenological Analysis, the absence of explicit decision logic for clustering emergent themes into superordinate themes, a stage that Smith et al. (2009) describe descriptively but never structure into a sequential procedure. In response, this paper has proposed a four phase decision-making framework, comprising a structural check, a narrative test, a conceptual test, and a dual-layered recognition, that organizes all six of Smith et al.'s (2009) clustering techniques, numeration, contextualization, abstraction, subsumption, function, and polarization, into a single, traceable pathway. Rather than replacing the interpretive judgment that IPA depends on, the framework gives that judgment a clearer structure to work within, helping novice researchers minimize the risk of analytic drift

while producing research diary entries that can be traced back to specific, identifiable decision points. At the same time, the framework should be understood as a heuristic compass rather than a fixed procedure, one that carries its own limitations, including an unresolved tension with IPA's traditionally flexible ethos, an assumption of reasonably coherent participant narratives, and a need for empirical validation that this conceptual paper has not itself undertaken. Taken together, these contributions and limitations point toward a modest but concrete step forward, one that future empirical work can test, refine, and extend, so that the clustering stage of IPA becomes a little less of a tool for the researchers who are only just learning to work within it.

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