## Description

First cycle coding is a way to initially summarize segments of data. Pattern Coding, as a second cycle method, is a way of grouping those summaries into a smaller number of condensed categories, themes, or concepts. For qualitative researchers, it is analogous to the cluster analytic and factor analytic devices used in statistical analysis by our quantitative colleagues.

Pattern Codes are explanatory or inferential codes, ones that identify a theme, configuration, or explanation. They pull together a lot of material from first cycle coding into more meaningful and parsimonious units of analysis. They are a sort of “meta code.”

## Applications

Pattern Coding does not belong to any one particular qualitative research methodology. According to Miles et al. (2020, pp. 79–86), Pattern Coding is appropriate for:

- condensing large amounts of data into a smaller number of analytic units (categories, themes, concepts)
- searching for causes and explanations in the data
- examining social networks and patterns of human relationships
- forming theoretical constructs and processes (e.g., “negotiating,” “bargaining”)
- laying the groundwork for cross-case analysis by generating common themes and directional processes.

Pattern Coding differs from grounded theory’s Focused Coding in that the latter generates primarily categories. Pattern Coding constructs categories as well, but also extends beyond classification toward higher-level themes, concepts, and other analytic abstractions such as theoretical constructs (see Chapter 11). Think of a Focused Code as an individual paper file folder (with each separate sheet of paper in the file representing a first cycle code), while a Pattern Code is the summative label attached to the front of a drawer full of related folders (i.e., categories) in a filing cabinet.

# Example

Five staff members of a small office were interviewed separately about their administrative leadership. Each one remarked how internal communications from their director were occasionally haphazard, incomplete, or non-existent. Each passage below was initially Descriptive Coded or In Vivo Coded. Note that one sentence is bolded because, during coding, it struck the researcher as a strong statement.

Code example 14.1

| | |
|---|---|
| SECRETARY: [1] I often have to go back to her and get more information about what she wants done because her first set of instructions weren't clear. | [1] unclear instructions |
| RECEPTIONIST: [2] It's kind of hard working for her, because she rushes in, tells you what needs to be done, then goes into her office. [3] After she's gone you start doing the job, and then you find out there's all these other things she didn't think of to tell you. | [2] rushed directions<br><br>[3] incomplete directions |
| ADMINISTRATIVE ASSISTANT: [4] Sometimes I think she expects you to read her mind and know what she wants, or that she expects you to know everything that's going on without her having to tell you. [5] **I can't do my job effectively if she doesn't communicate with me**. | [4] expectations of info<br><br>[5] "she doesn't communicate" |
| BUSINESS MANAGER: [6] I hate it when she tells | [6] written |

| | |
|---|---|
| me in the hallway or in a conversation what to do. I need it written in an e-mail so there's documentation of the transaction for the operations manager and the auditor. | directions needed |
| FACILITIES MANAGER: [7] Sometimes she doesn't always tell me what she needs, and then she gets upset later when it hasn't been done. Well, that's because you never told me to do it in the first place. | [7] "you never told me" |

Similar codes were assembled together (see Figure 14.1) to analyze their commonality and to create a Pattern Code.

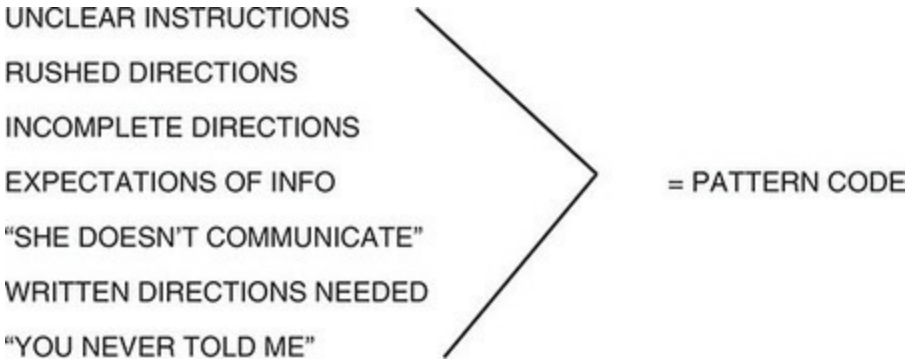


**Figure 14.1** Codes assembled to determine their Pattern Code

Several ideas were then brainstormed for the Pattern Code, among them:

- "SHE DOESN'T COMMUNICATE" (an In Vivo Code from the Initial Coding cycle that seemed to hold summative power for the remaining codes)

- MISS-COMMUNICATION (a title reference to the female administrator—a flip yet sexist code).

But after researcher reflection, the final Pattern Code created and selected for the above data was:

- DYSFUNCTIONAL DIRECTION (a Pattern Code that suggests action with consequences).

## Analysis

These interview excerpts contain consequential words and phrases such as “if,” “and then,” and “because,” which alert the researcher to infer what Miles et al. (2020) state are causes and explanations in the data. Finally, the bolded sentence, “**I can’t do my job effectively if she doesn’t communicate with me**,” seems to holistically capture the spirit of the dysfunction theme at work.

The Pattern Code, in concert with the “if–then” actions and bolded statement, led the researcher to construct the assertion: *Poor communication from administrative leadership results in staff members who feel not just frustrated but personally unsuccessful at their jobs.* The explanatory narrative continues with evidence to support the claim, then describes the dysfunctional workplace dynamics for the reader.

For second cycle Pattern Coding, collect similarly coded passages from the data corpus. Pattern codes can be constructed from repeatedly observed routines, rituals, rules, roles, and relationships; local meanings and explanations; commonsense explanations and more conceptual ones; inferential clusters and “metaphorical” ones; and single-case and cross-case observations. CAQDAS searches, queries, and retrievals will assist greatly with this process. Review the first cycle codes to assess their commonality and assign them various Pattern Codes. Use the Pattern Code as a stimulus to develop a statement that describes a major theme, a pattern of action, a network of interrelationships, or a theoretical construct from the data. Daiute (2014) labels this the search for common “scripts” in data from multiple participants, “shared ways of knowing, interpreting, acting in the world … implicit shared orientations that organize people’s perceptions and actions” (p. 142) that form a master narrative or dominant discourse.

Gibson and Brown (2009, p. 143) recommend an analytic process

related to and useful for Pattern Coding called “super coding” (also found in some CAQDAS programs), which finds relationships between codes and saves the query for future reflection and continued analysis. Super coding searches for these relationships among coded data using Boolean search terms (*and*, *or*, *not*, *and/or*), or semantic or proximity operators (Friese, 2014, p. 34). Thus, if you wanted to pool the data units from the corpus coded incomplete directions *and* unclear instructions *and* rushed directions, you would enter these three codes for a CAQDAS Boolean search, then examine what possible relationship might exist between the three sets of coded data to develop a new super code. In this case, directions and instructions would be considered synonymous, but the goal is to determine what incomplete, unclear, and rushed have in common. Perhaps the super code that represents all three and emerges after analytic reflection would be labeled ineffective instructions or vague guidance.

“Many codes—especially pattern codes—are captured in the form of metaphors (‘dwindling efforts’ and ‘interactive glue’), where they can synthesize large blocks of data in a single trope” (Miles et al., 2020, p. 326). Several Pattern Codes can arise from second cycle analysis of qualitative data. Each one may hold merit as a major theme to analyze and develop, but Pattern Codes are hunches; some pan out, others do not.

Some recommended ways to further analyze Pattern Codes are (see Appendix B):

- action and practitioner research (Altrichter et al., 1993; Coghlan & Brannick, 2014; Fox et al., 2007; Stringer, 2014)
- assertion development (Erickson, 1986)
- content analysis (Krippendorff, 2013; Neuendorf, 2017; Schreier, 2012; Wilkinson & Birmingham, 2003)
- decision modeling (Bernard, 2018)

- grounded theory (Bryant, 2017; Bryant & Charmaz, 2007, 2019; Charmaz, 2014; Corbin & Strauss, 2015; Stern & Porr, 2011)
- interactive qualitative analysis (Northcutt & McCoy, 2004)
- logic models (Knowlton & Phillips, 2013)
- mixed methods research (Creamer, 2018; Creswell, 2014; Creswell & Plano Clark, 2018; Tashakkori & Teddlie, 2010)
- qualitative evaluation research (Patton, 2008, 2015)
- situational analysis (Clarke et al., 2015a, 2018)
- social media analysis (Kozinets, 2020; Paulus & Wise, 2019; Rogers, 2019; Salmons, 2016)
- splitting, splicing, and linking data (Dey, 1993)
- thematic analysis (Auerbach & Silverstein, 2003; Boyatzis, 1998; Smith & Osborn, 2015).

## Notes

See Focused, Axial, and Theoretical Coding (Chapter 13) for analytic processes comparable to Pattern Coding. For an extended discussion and examples of Pattern Coding, see Miles et al. (2020).