Introduction to the Q-Block Symposium

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The Q community, in terms of research interests and objectives, is one of the most diverse groups of researchers in all of science. We are tied together, not by our scientific interests or disciplines, but by our fascination with Q methodology as a tool for the understanding of human subjectivity—the essential environment of all of social science. This issue of *Operant Subjectivity* is focused on one aspect of that community of interests, the nexus between ipsative and normative research methods.

There is little in the literature that touches upon this area of Q methodological research, not because little of this sort of research has been done, but because little of what has been done has been reported in academic journals. The bulk of the research involving Q as a gateway into the world of normative research has been done in the commercial, and therefore proprietary, arena. The selection of papers in this volume may serve as a useful beginning for a topic that has had little notice in the academic world.

Q methodology is an ipsative research approach in that it focuses on the individual rather than the collective and preserves the integrity of the individual in the final result. Normative methods such as sample surveys, more often used by researchers in the social sciences both in the academic and in the commercial worlds, deal with the collective behavior of groups of individuals, but in the process individual identity is lost. That is not to say that one methodological camp or the other exclusively occupies the scientific high ground. Each has its strengths and weaknesses and each has its distinct niche in the researcher's armamentarium.

There are many dichotomies in social science—pure science vs. applied science, qualitative methods vs. quantitative methods, ipsative vs. normative, the list goes on. Labels are thought to be descriptive, but in fact they are restrictive and exclusionary. Researchers tend to self-select into one side or the other of those dichotomies. Qualitative researchers mistrust quantitative researchers. Q methodologists look askance at R methodologists—and vice versa. As a consequence, we

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often overlook valid and valuable approaches to solving research problems.

The most important steps in the research process and those often given only cursory attention are the first steps—the statement of the problem and the choice of method to solve the problem. Researchers too often conceive of the research problem in terms of the research method they prefer. This fixation with method over process can, and often does, lead to intractable difficulties later in the research process. An acceptance of mixed methods of research is often not only the preferable way to solve a research problem, but the only way.

Depending on the discipline, the choice of a preferred methodological approach over a mixed methods solution may be a major issue or may be altogether irrelevant. William Stephenson, as a psychologist, was particularly interested in the understanding of the psychology of the self and in that pursuit used single-case Q studies as a major investigative tool. In other pursuits, his forays into marketing research for example, he used Q with groups of subjects to explore potential consumer behavior. Though focused on Q methodology, he was accepting of the use of mixed methods when other approaches were appropriate.

Stephenson's varied interests—the psychology of the individual and the consumer behavior of groups of people—illustrate the gulf between pure science and applied science. Indeed, Q methodology was conceived and grew in its early stages as an integral adjunct to his interests in the psychology of the individual and psychoanalysis in particular. Over time it became increasingly apparent that Q methodology had far broader application.

That broader application extended to the marketplace. Stephenson made a valuable and lasting contribution to the science of marketing research with his well-known efforts for such clients as Ford, Studebaker, Philip Morris and others. In fact, his marketing research was sufficiently successful that it required some creativity for the University of Missouri School of Journalism in cooperation with advertising and marketing research agencies in St. Louis to offer him the faculty position and entice him back to academe, where he remained for the rest of his career.

The commercial and organizational need for applied research into human behavior can provide ample financial support for behavioral research. Rationales for such research include, among other things, better understanding of consumer behavior in the market, of voter behavior in the political arena and of stakeholder issues for public policy formulation.

It is in this arena that mixed methods of research can become a major issue for the Q methodologist. In research aimed at improving the

effectiveness of persuasive communications, the problem is conceptually simple, but more complex in execution. Paying clients for research need to know two things. First, they need to understand the nature of the problem they face and effective strategies for persuading their target audiences. Secondly, they need to know the relative size of the market segments, the voter blocs or the stakeholder groups or, in Q terminology, the factors.

The first requirement, understanding the nature of the problem and the effective strategy for addressing those issues with the various opinion groups, is very effectively addressed by Q methodology. Q, however, is simply not equipped to deal with the second requirement, that of the relative size of the groups or factors in the population, thus the need for a mixed-methods approach.

This need for a complementary research method to address this issue was perhaps first addressed by then doctoral candidate, Albert Talbott, in his research paper, reprinted in this issue, at the 1963 Convention of the Association for Education in Journalism. Talbott was working in the Michigan State University Communications Research Center under the tutelage of Professor Malcolm MacLean. The Center was then (and still is) a bastion of survey research. That mindset perhaps explains the genesis of Talbott's early efforts to merge the strengths of both Q and R methods.

MacLean had come to understand that Q methodology had much to offer the social sciences in areas that normative research was unable to address. In the course of his developing interest in Q methodology, he met with William Stephenson and his interest deepened. At the University of Iowa School of Journalism, MacLean developed a center of excellence for Q research and teaching. Stephenson, following his retirement from the University of Missouri, taught and mentored several doctoral candidates at Iowa.

Talbott, with his Q-Block method, firmly established the efficacy of meshing the complementary strengths of Q and R in one research project. Others, most of them in the commercial arena, have used Q-block method or other similar approaches since with mixed, but mostly positive, results.

The logic of meshing Q and R studies to the benefit of both is compelling. The strength of Q is explanatory; the strength of R is measurement. The understanding of the issues provided by Q largely compensate for the potential for researcher bias in questionnaire construction that plagues survey research. Rather than relying on the researcher's understanding of the subject at issue or on often arbitrary literature-derived theory for structure, the researcher can base the survey on the operant issues discovered by the Q study. The result,

optimally, is the ability to project to a population the results of a Q study.

There remain continuing frustrations with Q-block method and with the proposed alternatives, however. Implementing Q-block method in follow-on survey research can become unwieldy with more than three or four factors in the original Q study as the difficulty of associating respondents with factors increases dramatically with the number of factors.

The more frustrating issue is that our natural tendency is to expect Q-block method or an alternative technique will firmly pin the subjects of the sample survey to specific factors discovered by the Q study. It will not.

The difficulty arises with the realization that Q-block method, or any of the alternatives, does not find proportionately larger numbers of pure types in the population than Q methodology finds in the original study. There are confounded individuals muddying the waters of both phases of the research. The best outcome that can be expected from the R phase of such a research project is that it will produce a rough estimate of the relative size of the market segments, voter blocs, stakeholder groups—or factors. And it is a second-generation estimate at that—an estimate generated by an R study of an estimate generated by a Q study.

In that both the Q study and the follow-on R study are essentially estimates of the real world, ambiguities in the Q study will be reflected and probably compounded in the R study, so clarity in the Q study is essential. In studies such as these, Q methodology is used to discover typologies, to discern differences in opinion groups, rather than to necessarily uncover the underlying psychological processes that drive the formation of factors. While judgmental rotation is often quite valuable in the analysis of a stand-alone Q study, here judgmental rotation may increase ambiguity when translated to the R study. This argues for rotation to simple structure as a starting point in this type of Q study, whether with judgmental rotation or with a mathematically unique solution such as Varimax. Fortunately, in practice a Q study designed to discover prevailing typologies of opinion relevant to consumer behavior, for example, a simple-structure solution is often clear and unambiguous. There are, of course, exceptions where judgmental rotation can improve the analysis.

When using Q alone to define market segments, voter blocs or stakeholder groups, we may view the factors as hypothetical individuals. The advantage of a follow-on R study that estimates the relative size of the factors or segments is that we may more efficiently use limited resources to reach groups that are likely amenable to change.

In the process of a persuasive communications effort, whether it be a marketing program or a public policy program, the market segments fall into three broad categories: those who are positive toward the goals of the marketing effort, those who are negative toward it and those who are undecided. Those in the two "decided" categories are less likely to change positions when exposed to a persuasive communication program. The bulk of the marketing budget should, therefore, be aimed at those in the undecided category, that is, at those who are open to change.

By programming persuasive messages to those hypothetical individuals associated with factors open to change, or "the target market," we may expect to reach large numbers of people who associate themselves with the mindset we would like to reach. The content of the persuasive message can be tailored to the group or groups and the R study can discover patterns of media usage by each group, making dissemination of that persuasive message a practical process.

Although not a mainstream approach to Q-methodological research in the academic world, the considerable practical advantages of combining both Q and R studies in a single research project is a valuable, if underused, applied research method in many other situations. Each of the papers in this issue offers an alternative to extend the utility of Q research beyond its inherent limitations. None of the methods is perfect; all have promise.

This issue may serve as the beginning of a stimulating conversation.

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