



Technical Research Note

Who Performs the Q Sort?

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If you merely want to show the existence of factors, any person or persons will do. Simply entice, bribe, wheedle, or exercise dominance over loved ones, students, or others in a delicate situation, and they will usually perform a Q sort. That factors will emerge from appropriate analysis is left in no doubt by 50 years of published work since *The Study of Behavior*. But if you have practical problems to solve, you may want to try to acquire the viewpoint of quay¹ individuals like Professor Benitez as did William Stephenson in 1964 when explicating George C. Thompson's theory of public opinion.

Thompson conceptualized public opinion according to "reasonableness," or elaboration according to definiteness with regard to *practical action* and *theoretical completeness*. Thompson then subdivided each of these theoretical strata into additional categories of (a) biases, notions, policies, as well as (b) general preferences, wishes, and beliefs. Each of the triplets constitutes a hierarchy of definiteness, i.e., biases and general preferences being least definite and policies and beliefs most definite. Thompson's 19th century theory did not depend on the nose counting that would become so popular in the survey research that dominates much of current social theorizing. The theory is complex, interesting, and provocative, but Stephenson wanted to reduce this *a priori* ratiocination to scientific operations. He considered Thompson's theory the most worthy starting point for his own development of an operant method for the evaluation of controversial matters of public opinion.

¹ Quay (pronounced: key), n. Solid stationary artificial landing-place usually of stone or iron lying alongside or projecting into water for (un)loading ships. *The Concise Oxford Dictionary*: (Not a perfect match with Stephenson's airport concourses radiating out in various directions and the complexes of individuals clustering in factors at the nodes, but reminiscent and nicely in tune with the concept of key individuals so central to modern public relations practice and theory.)

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It is true, of course, that Stephenson did not actually approach the professor for his sort but opted for a close reading of Benitez's paper on the U.S., Cuba, and Latin America and provided, as best he could, the view this revealed. Were Stephenson to have had his druthers, he would surely have had the professor do his own sorting, but the point was to provide a possible non-American² *expert* view on the then (and still continuing) controversy over Castro's Communist Cuba. Following Thompson's detailed schema, Stephenson proposed also to sort those who have a *special interest* in the controversy, *existing authorities* who would speak for one or another side of the topic, *class interests*, and the *uninformed* who may be shut-ins, the poor, children, or the like. That Stephenson also called for balancing the selection of respondents by sex is often not recalled in the citing of this well-known paper.

Such purposive sampling of respondents was therefore not random or haphazard. Rather, it was done to serve faithfully the inherent assumptions of Thompson's theory of public opinion. Stephenson called such purposive samples — when buttressed by the articulated structure for Q concourses — “fundamental in the measurement of public opinion” (Stephenson 1964a; 1964b). Nevertheless, Stephenson cautioned that one should not expect those categorized as belonging to one of the named classes to necessarily share the views of others in that *a priori* category. Rather, individuals would sort themselves operantly into types held together by their subjectivities. Missing out the *expert* category in the Cuba Controversy, however, would have overlooked the non-American view of Benitez that Stephenson seems to have gauged to be the catalyst to that problem's resolution.

For the evaluation of controversial general public opinion issues, most any Q methodologist might nowadays profitably proceed from Stephenson's starting point. But the revealing of subjective structure has not been, and is not now, only the province of Q public opinion research. A purposive person sample could, in the proper circumstances, well ignore the Thompson schema to work with a single person. A different purposive sample might include only 10 women and no men. Another might focus on a business' customers and even its non-customers. Respondent selection will depend on the problem to be solved — or at least addressed.

When Stephenson worked at the National Institute for Mental Health, he was asked to consult on the so-called Genain Quadruplet case, wherein four abused young women suffered from schizophrenia believed induced by an abusive family life. Stephenson found that of the four, only Myra could satisfactorily assist in her own evaluation of self. Through a two year Q investigation Stephenson made remarkable discoveries including that Myra understood clearly what she was about and what the attending psychiatrist's

² Stephenson labels this view as *unAmerican*, but the meaning is clearly “not an American viewpoint” rather than anti-American. Not unknown for puckish acts against dogma, Stephenson may be casting a condemnatory eyeball at the then not-too-distant McCarthy hearings.

therapy goals for her were. Astonishingly, this single-case research also revealed that the psychiatrist poignantly misunderstood Myra, and, therefore, could be of little help to her recovery. None of these findings relied on Thompson's schema; and indeed, using it to assist Myra would have been just as absurd as would a random "patient" selection.

In a study for a public utilities company of central Missouri, Stephenson was engaged by a client who wanted to correct a bad public image (Stephenson 1963). The sorters were ten purposively selected housewives, revealing two views of the utilities company, neither negative! No pretense about Thompson public opinion categories here. It was the views of the paying customers of the utilities that Stephenson wanted to put before his client. His purposive sample included no men, no single women, and no divorced mothers, because in 1963 in Missouri, housewives did the utility bill paying, and out-of-marriage births were less than one per cent. A new investigation today would certainly demand quite a different purposive sample.

In my own Q research, I have sometimes followed Thompson's Schema. To set the conditions to solve the Yugoslav nationalities problem in 1977 — somewhat before the splintering of that tragic state — I proposed the following purposive people sample in an article published in Croatia (Barchak 1978). *Special interests* would be represented by Yugoslav business managers as well as by leaders of the Catholic, Moslem, and Orthodox Churches. *Expert* respondents would include the Praxis-Marxist philosophers and perhaps even President Tito. *Existing authorities* would be represented by theoreticians and politicians from each of the republics and provinces. *Class interests* could be construed as something close to the Marxist sense of the term to include the proletariat, peasants, and perhaps technocrats. Finally, the uninformed would be children, the poor, or shut-ins. The design called for sorting 105 people, the most that Q programs of the day could handle — and far more than is prudent. Sadly, though much talked about in Yugoslavia, this research was never conducted.

But I have often strayed from Thompson when studying the philosophies of communication scientists, the marketing of building supplies, relationship building with the audiences of a symphony orchestra, or assessing community attitudes toward recycling. Sometimes one even discovers what is unwise to discover about respondents. Such happened when I learned the prevailing and competing paradigms of the communication field in the 1970s. Using the 100-name list of editors of the *Journal of Communication*, I had responses from nearly half with almost 40 useable, including leading scientists and one of the field's four founders, Paul Lazarsfeld. A plenary session was arranged at ICA in 1985 to bring representatives of each of the four paradigms together for discussion in front of the general members of the organization. A last minute switch banished the discussion to a behind-the-stairs, last-day rump session presumably because conference organizers noticed that a favored factor

viewed science as able to achieve “absolute certainty.” Three eastern Europeans and a Swede shared this true believer attitude, which was distinct from the higher-order fallibilism³ entertained by the other three paradigmatic types.

In the 1980s, career opportunities took my choosing of respondents into the field of public relations. An integrated marketing study done for a state-based building supplies company focused on the contractor side of their business. The company’s current customer database was merged with what Peter Drucker calls the “non-customer” list. To my mind, three categories of contractors asserted themselves: (1) large volume contractors, (2) medium volume contractors, and (3) occasional or spec(ulation) contractors. Each of these groups was sub-divided according to its current status with the building supplies company: (a) those currently doing business with the company, and (b) those who were not doing business. Replicating the 3×2 factorial four times, the six possible combinations would have required 24 contractors to be interviewed. Eighteen were actually interviewed and Q sorted. I also had the general manager/owner perform the Q sort as well as his chief outside sales representative. Then I performed the sort as the manager/owner, the outside sales representative, and as a large, doing-business contractor. My estimations of all three proved correct, appearing on the expected theoretical factors. This gave confidence to my interpretations. Since this was also a teaching situation with seven undergraduate assistants, each also performed a sort demonstrating a large-volume contractor point of view. An interesting respondent-related outcome is that the rough-around-the-edges sales representative understood contractor business desires better than the refined MBA owner who worked tirelessly and had grown up in the business. Respondent selection was thus directed partially by conscious theory and partially by keeping an eye on the problem to be confronted.

Initial research for a rather accomplished local symphony orchestra revealed shortcomings in attracting children, African-Americans, teachers of music, and people from adjoining counties. The last category was partially dropped due to a lack of resources and because informal research revealed that nationwide symphony attendance falls off sharply after a distance of only five miles or so. Still, the representative respondent list was complex and included current members who were both men and women, young and older; young boys and girls who had or had not attended a school-based audience-building symphony event called Close Encounters where students not only heard music

³ *Higher order* is Stephenson’s terminology for the factor of the factors, i.e., factor analyzing the factors to see if there is an even more fundamental agreement between the types. *Fallibilism* is one of the names that Charles S. Peirce, the towering philosopher of science to whom Stephenson owes so much, gave to the revolutionary philosophical attitude that characterizes the great scientific changes of the 19th and 20th centuries. In Barchak’s dissertation study of the doyens of the various fields of communication, this was indeed the case. Only the Marxist-Leninists expected to achieve absolute certainty through science.

but got to interpersonally interact with the musicians; non-attending citizens and non-renewing season subscribers, both men and women; men and women African-Americans who attend or do not attend; and teachers of music of both sexes who are or are not members of the symphony. Fifty-six sorts in all were collected and processed into four factors. A favorite result was the 9-year-old girl sharing a factor with a 70-year-old, Juilliard-educated male conductor who had served as Leonard Bernstein's accompanist. So much for a *priori* categories, but they do get matters going systematically.

To study the faltering recycling plan for a medium-sized city in the late 1990s, I returned to the Thompson schema but only as a starting point. Sensitivity to power and race issues suggested that *Experts* and *Authorities* should be considered together. Each respondent could then consider himself or herself to be in whichever initial category was deemed most pleasing. Sorted under the *Experts/Authorities* designation were the top city sanitation official; the president and a member of the citizen recycling committee; all seven members of the racially-mixed city council; the city's industry leading waste management company's recycling coordinator and the marketing representative for the same company; as well as the mayor and the mayor's chief administrative assistant. A *Special Stakeholder* category covered both Thompson's *special interests* and *class interests*. Included were city recycling workers, teachers, an ad executive, a newspaper gatekeeper, a civic leader, a TV news gatekeeper, a professor of communication (myself), and a private recycler. The *uninformed* were re-designated *Regular Citizens* and required two women and two men recycling customers as well as two women and two men non-customers from each of the four collection areas of the city. The respondents were included because they would manifestly have a hand in the solution. My sort was included, as it often is, as a reference point to locate my own bias in factor space.

Finally, I present three studies where my choice of respondents was mostly or entirely current students. If the judgment of the Q list discussants be dispositive, each of my three studies could be ignored by reason of that choice alone. However, there was usually some method to my madness, though some convenience as well, I must add. In sorting attitudes toward America and Americans, I chose communication students from an advanced class at the University of Helsinki while a Fulbrighter there. To call Helsinki the Harvard of Finland is perhaps to undervalue its scholarship. Such students as attend the university were to be — and perhaps now are — the media elite of Finland. Their two highly correlated attitudes toward American government and policy were uniformly negative; odd for a nation that has for the past two decades been routinely called the most Americanized country in Europe. Sixteen years after my research, however, the population — and not just communication students — are nearly unanimously vitriolic about American foreign policy. Sometimes students are the correct purposive respondents!

This is also the case for my study of the place of foreign languages in the university curriculum. Here, however, teachers of foreign languages were asked to give their understandings along with a much larger number of students. Neither discovered attitude, one utilitarian and the other soulful, supported the university's precipitous off-loading of foreign language study from the core curriculum. Had the study commenced before the institutional decision had been made, it would have been wise to include all the relevant administrative decision-makers in the P set invited to do the Q sorting. One needs to know the opposition.

Underway now is my most recent study involving students, this on the subject of the Second Iraq War. Respondents are southern young adult students, both men and women as well as Caucasians and African Americans. It is a longitudinal study that so far has three phases: Before hostilities, during the most dangerous phase, and after the capture of Baghdad. There may be follow-on in fall, 2003, when most of the students will conveniently continue their studies with me. They are a somewhat captive group, bribed with small doses of extra credit. Students are volunteers, but I admit to coaxing. Racial differences in sorting would not be surprising, but sex is not a likely determinant, or so go my pre-analysis hunches.

To sum up, Thompson is a reliable starting point for general public opinion controversies. Other contentious situations demand bringing to the table representatives of all discovered types, precisely those who could promote or inhibit a problem's consideration and resolution. Do not hesitate to reconsider or add respondents while the research is underway. The aim of Q research is to lay bare the limited independent variety of understandings so that the flow of human communication and action may proceed productively. It should not be constrained by dogma.

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