
WHAT'S PAST IS PROLOGUE

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... he who knows how to wait need make
no concessions.
(Freud, 1922, p. 40)

In his 1935 letter to the British science journal *Nature*, William Stephenson introduced an idea that was later to be named Q methodology, and in that letter he waxed optimistic about his invention, which (he claimed) “brings the factor technique from group and field work into the laboratory, and reaches into spheres of work hitherto untouched or not amenable to factorization” (p. 297). Among those spheres hitherto untouched, Stephenson explicitly mentioned aesthetics, educational and “pure” psychology, and Spearman’s *g*, all of which he said were now subject to scrutiny under “greatly improved experimental conditions.” The generic term for all of these spheres has come to be referred to as *subjectivity*, and it is the provision for a scientific study of subjectivity that is Q’s *raison d’être* and its claim to fame.

People hold opinions about things—e.g., that the U.S. ought not to have gotten itself involved in Iraq without U.N. backing, or that the best-selling novel *The Da Vinci Code* is a thrilling story, or that there is life after death, etc., all of which are purely subjective, i.e., are not subject to proof in the same way that we can prove that $2 + 2 = 4$ or that water freezes at 0° C. An opinion requires an advocate, which implies self-reference, whereas a fact does not. Prior to Q methodology, however, there was no systematic way to qualify all of this subjectivity, or at least no way that could toe the mark in scientific respects. Poets and philosophers down the ages had always been aware of the importance of subjectivity, just as they had also known about dreams, but it took a Freud to invent a systematic means for studying dreams, and Stephenson did the same for subjectivity.

This special issue on Q methodology provides a convenient occasion for a tentative assessment concerning the extent to which Stephenson’s initial optimism has been vindicated. At the outset, his ideas were met with disbelief and even irritation. Following the death of Sir Charles Spearman, who was Stephenson’s mentor, Sir Cyril Burt was the leading British factor analyst, and his own views on correlating persons were so at variance with Stephenson’s that the two of them found it necessary to clarify their respective positions in a co-authored article (Burt & Stephenson, 1939). There were some points of agreement but many of disagreement, and several of the latter could be traced to a matter of definition

concerning the nature of the matrix (or matrices) that were to be factor analyzed.

With regard to the distinction between Q and R, for instance, Burt regarded the two of them “as involving much the same aims, methods, and theorems, and ... as merely alternative ways of analyzing any rectangular table of figures” (Burt & Stephenson, 1939, p. 274). That is, for Burt, there was always only a single matrix that was at issue, and calculating correlations between the columns of that matrix was R method, and between the rows Q method. Burt’s reciprocity principle therefore stated that the “factors obtained in correlating persons should be of the same nature and number as in correlating traits” (p. 278) since the two sets of factors had emanated from the same set of numbers.

Stephenson, on the other hand, held that “Burt’s arguments confuse a reciprocity that may conceivably apply to one and the same set of data with Stephenson’s postulation of two distinct sets of data that are quite unrelated and serve different psychological objectives” (Burt & Stephenson, 1939, p. 278). Hence, for Stephenson, there were always two matrices at issue—one comprised of objective trait measurements (such as IQ, reading speed, etc.) and that was to be R factor analyzed, and then a second comprised of subjective responses (such as obtained from Q sorting) that was to be Q factor analyzed. R method was applicable to the columns of the first matrix (which could also be examined by rows), whereas Q method was applicable to the persons of the second matrix (which could also be examined via rows and then columns)—hence his earlier reference to four distinct factor systems (Stephenson, 1936). It was the R analysis of the first matrix and the Q analysis of the second matrix that Stephenson meant by R and Q; i.e., two separate matrices were involved.

Fifteen years later, in his review of Stephenson’s *The Study of Behavior*, Burt (1955) was still entertaining the assumption of a single data matrix, so that “if we confine ourselves to measurements obtained on a single occasion, we may either average the persons and correlate the traits, or [for the same matrix of data] average the traits and correlate the persons” (Burt, 1955, p. 58), a view that he maintained until the very end (Burt, 1972). By the time Stephenson’s book appeared, all other major factor analysts had weighed in on the side with Burt—Charlotte Banks, Hans Eysenck, and Godfrey Thomson (with some reservations) in Britain, and later R.B. Cattell, J.P. Guilford, Quinn McNemar, and L.L. Thurstone in the U.S. (*The Study of Behavior* was published over Thurstone’s reservations, a decision that was vindicated when the book was republished in 1975 as part of the

University of Chicago Press’s Midway classics series.) Cronbach and Gleser (1954) were not atypical when they characterized Stephenson’s work as “treacherous” (cf. Stephenson, 1954), and this official view was incorporated into Mowrer’s (1953) lengthy history. Only those U.S. writers outside psychology proper—e.g., systems theorist Russell Ackoff, social worker Charles Gershenson, and psychiatrists Bernard Glueck and Lyman Wynne—wrote receptive reviews. In sociology, both Ralph Turner and Melvin DeFleur were critical, respectively, of *The Study of Behavior* and also of Stephenson’s later work, *The Play Theory of Mass Communication* (1967), and this helps to account for why it is to this day that the number of studies employing Q methodology in sociology can be counted on one hand (with some of the fingers missing!), although it is to be noted that Q has recently been taken up with enthusiasm by a vigorous group of Russian sociologists (<http://www.qmethod.narod.ru/>). In part because of Burt’s preeminence and his opposition to Stephenson’s ideas, Stephenson left Britain in 1947 and moved to the United States, where he spent the remainder of his life.

By the early to mid 1960s, interest in Q methodology by U.S. psychologists faded—only those in the specialized field of personality assessment retained interest in Q sorting as a technique (e.g., Block, 1961)—and it was not resuscitated for another 30 years. This decline in interest coincided with Stephenson’s departure from the Department of Psychology at the University of Chicago (1956) and eventual move two years later to the University of Missouri’s famed School of Journalism, where he was Distinguished Professor of Advertising Research until his retirement in 1972. During this time, his play theory stimulated interest in Q methodology in the communication sciences, leading to many publications and dissertations (at Missouri and the University of Iowa in particular) by individuals who now occupy senior academic positions. Play theory was compared favorably with the theories of McLuhan, Ellul, and Marcuse (Rowan, 1978), leading to its republication in 1988.

I was introduced to Stephenson’s ideas while engaged in graduate studies in journalism in the early 1960s and carried that growing interest with me when I transferred to political science, certain parts of which were undergoing renovations that made them receptive to what Q methodology had to offer. As interest diffused and gained momentum, it became necessary to establish lines of communication, and so in 1977 a quarterly journal/newsletter was created (entitled *Operant Subjectivity*, in continuous publication now for almost 30 years) and in 1985 the first annual

conference was held. The synergy resulting from interdisciplinary contact led to the establishment in 1989 (just a few months after Stephenson's death) of the International Society for the Scientific Study of Subjectivity (IAS), which holds its 21st annual meeting in 2005 in Vancouver and its 2006 meeting in Trondheim. These initiatives have been complemented by the Q-Method electronic discussion list (500 subscribers worldwide) and the Qmethod web site (www.qmethod.org). The development and accessibility of the PQMethod freeware and PCQ software packages for data entry and analysis (Schmolck & Atkinson, 2002; Stricklin & Almeida, 2004) have played a significant role in flattening the technical learning curve and placing Q in the hands of new audiences.

The acceleration of interest in Q methodology in recent years is indicated in initiatives such as the Korean Society for the Scientific Study of Subjectivity (K4S) and its journal, *Q-Methodology and Theory*, and the newly published *Journal of Human Subjectivity*, as well as by the publication of Q methodological studies in leading journals and academic presses, including a previous special issue (Goldman & Brown, 1990). The appearance of the volumes by Brown (1980) and McKeown and Thomas (1988) were helpful in clarifying the ideas hidden in Stephenson's denser prose. More recent indications of progress are visible in the quality and sophistication of signpost publications such as recent encyclopedia articles (Brown, 2004; Ozer, 2001; Robbins, 2005), book chapters (Brown, *in press-a*, *in press-b*; Brown, Durning, & Selden, 1999; Durning & Brown, *in press*; Febraro, 1995; Gauzente-Juguet, *in press*; Smith, 2001, pp. 319-343; Stenner & Stainton Rogers, 2004; Stainton Rogers, 1995), and in those methodological chapters in books that substantially rely upon Q methodology (e.g., Aalto, 2003; Addams, 2000; Barry & Proops, 2000; Dryzek & Holmes, 2002; Peritore, 1999; Robyn, 2005; Sylvester, 1999). Technical workshops are now routinely available at annual Q conferences (and via on-line streaming at www.qmethod.org), and graduate seminars devoted to Q are increasingly available in U.S., European, and Oriental universities. In 2004, Q methodology began to be taught to a largely European audience at the University of Essex (U.K.) Summer School in Social Science Data Analysis and Collection.

A non-academician whose interest in Q methodology dates back more than 30 years recently wrote that "I will go to my grave believing that Stephenson will eventually go down in scientific history as the equal of any of the other 20th century titans" (personal communication). Whereas it is too early for a definitive pronouncement of this sort, it may be safe to conclude that, on balance, the

discrepancy is narrowing between what Stephenson first envisioned in 1935 and the way in which Q methodology is currently understood and utilized. A recent chapter by Smith (2001), for instance, reverses 70 years of misunderstanding in academic psychology by placing Stephenson's work on par with other chapters on behaviorism, cognitive psychology, phenomenology, postmodernism, and other more obvious schools of thought, and goes even farther by suggesting that the other schools have much to learn from the study of operant subjectivity. If understanding of Q methodology was derailed by conceptual errors of the past, then the train of thought seems to have been placed back on the track where it is now rolling along on under its own steam toward its own destination with less worry about the sidetracks of the past. This special issue of *Human Resources Psychology* is testament to this achievement and may be said to mark the end of Q's lengthy prologue.

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