

The Secret Life of Focus Groups: Robert Merton and the Diffusion of a Research Method

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Published online: 24 February 2010
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Abstract Focus groups became popular in social research in the 1980s. Robert Merton has pointed to the continuities and discontinuities between focus groups and the wartime use of ‘focused interviewing’ he and his colleagues developed at the Bureau of Applied Social Research. Using a variety of sources, the paper attempts to chart the ways in which focused interviewing came to be taken up, diffused and modified in marketing research before re-emerging into sociology as the focus group.

Keywords Focus group · Focused interview · Robert Merton · Marketing Research · Sociology · Diffusion

Focus groups became popular in social research in the 1980s (see, e.g. Morgan 1988; Krueger 1988). Writing in 1987, the sociologist Robert Merton drew attention to what he saw as the continuities and discontinuities between focus groups and the method of ‘focused interviewing’ he and his colleagues had developed at the Bureau of Applied Social Research at Columbia University during and after World War II (Merton and Kendall 1946; Merton et al. 1956). In his 1987 article Merton noted that he had at that time only recently become familiar with the extensive use made of focus groups in marketing research, commenting that “there can’t be many people in the field of social science and certainly none in the related field of marketing research who know less about focus groups than I” (1987, 550). Nevertheless, he saw what he described as an ‘amiable congruence’ between what he had learned about contemporary uses of the focus group and the earlier wartime work on the focused interview¹ (1987, 556). This

¹Although the term ‘focused interview’ is used throughout this article and was used by Merton and his colleagues in their published writing, it should be noted that Merton himself had a personal preference for the alternative spelling, ‘focussed interview’ (1987, 559). Where a later writer referring to Merton et al’s work uses ‘focussed’ rather than ‘focused’ the spelling has been preserved here in quotation. Since ‘focussed’ was used in internal BASR documents, its use in subsequent writing often, but not invariably, indicates that the writer was referring to earlier unpublished versions of Merton et al’s work.

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congruence also presented Merton with what he regarded as an opportunity “to combine a newly emerging interest in the origins and rapid growth of focus-group research with [his] lifelong interest in identifying various patterns in the emergence and transmission of knowledge, particularly in the diffusion of knowledge from one socio-cultural world to another” (1987, 551)².

Merton distinguishes between ‘intellectual continuity’ and ‘historical continuity’ in tracing the reception of a particular idea (1987, 558). The former refers to the similarity or degree of resonance between particular ideas and/or practices, while the latter refers to the social and cultural processes that actually link them over time. Merton notes that the intellectual continuity between ideas often becomes blurred through a process he refers to as ‘obliteration by incorporation’ (see, e.g., Merton 1979). As a particular idea diffuses there is a tendency for its originator to become forgotten as later writers associate it with their more immediate and familiar predecessors. Merton clearly felt that, as far the focused interview was concerned, obliteration by incorporation had already occurred within sociology. He points out that those sociologists who in the 1980s championed the use of focus group methods (see, e.g. Morgan and Spanish 1984) made little or no mention of the earlier work by Merton and his colleagues on focused interviewing. If this was the case in sociology, Merton suggests, it would be also reasonable to expect obliteration to have occurred in other fields, such as marketing research. Nonetheless, he concludes, in the absence of empirical research on the topic, it would be difficult to assess the likely continuities and discontinuities, intellectual and historical, between the focused interview as it was originally developed and later focus group practice³.

Merton suggests that the relationship between focused interviewing and focus groups might well serve as a strategic research site for the diffusion of an intellectual innovation of a “modest, delimited, and readily identifiable kind” (1987, 562). He also notes that investigation of such diffusion would be amenable, among other approaches, to citation analysis. Following Merton’s suggestion, this paper examines the reception of Merton et al.’s. (1956) book⁴ *The Focused Interview* by means of a citation context analysis. Using a variety of online sources, it also attempts to chart the ways in which their work came to be taken up, diffused and modified in marketing research. No attempt will be made to provide a detailed history of the initial development of the focused interview. David Morrison has discussed the

² Merton had explored these aspects of intellectual diffusion for the concept of ‘serendipity’ in a long-unpublished work written with Elinor Barber (Merton and Barber 2004) and playfully in his (1965) book *On the Shoulders of Giants* which traces the origins of the aphorism “If I have seen farther, it is by standing on the shoulders of giants” usually attributed to Isaac Newton.

³ Merton and his colleagues saw focused interviewing as a general approach applicable to a range of situations. While their book contained a chapter on interviewing groups, this was largely seen as a special case to which the more general procedures and techniques set out by the authors could be applied. As Merton comments, “We never used the term ‘focus group’—at least not as I recall ...” (1987, 563).

⁴ There was a gendered division of labour at the Bureau of Applied Social Research (Rossiter 1995). Some familiar with the Bureau, like David Riesman (Lee 2008a), were more aware of this than others, (see, e.g., Sterne (2005) on C. Wright Mills). The precise nature of the collaboration between Merton and Kendall and Fiske is unclear. For some passing comment, see Merton (1998, 169; 208). Merton seems to have been scrupulous in crediting his co-workers.

history and context of focused interviewing at length (1998), and the topic has been discussed in Merton's own writing (Merton 1987, 1998). However, it might be helpful to provide some context.

It might seem strange that Merton, who even in the 1940s was developing a substantial reputation as a theorist, and who was working in an otherwise rather quantitative environment at the Bureau of Applied Social Research at Columbia University, should be involved in developing a method of interviewing that was essentially qualitative in character. By the 1930s governments had begun to regard morale as an important element in the planning and prosecution of war (Osborne and Rose 1999). The ability to sustain morale depended on a knowledge and understanding of its level in the population, and of the factors that affected it. This, in turn, implied establishing means by which morale could be assessed, and the developing technologies of opinion polling and research provided just such a means. Turner and Turner (1990) point out that morale was a particularly salient issue in the United States as war began to engulf Europe, given the legacy of resistance to America's entry into the First World War. When the United States did enter the war in 1941, a variety of agencies were set up to use opinion research methods to study military and civilian morale, both within the United States and outside it (Converse 1987, especially Chapter 5). One of these agencies was the Research Branch of the US Army's Division of Morale (later the Information and Education Division), directed by Samuel Stouffer, the work of which formed the basis for the famous four-volume study, *The American Soldier* published after the war. Robert Merton acted as a consultant to the Research Branch⁵. It was during this period that the focused interview was originally developed.

Merton was himself a skilled interviewer. He had "spent more time than I care to remember during the summer of 1932 when I was a graduate student at Harvard, helping to keep myself alive by working on a WPA project devoted to interviewing just about all the hoboes and homeless men and women that could be located in the Boston area" (1987, 553). As Stinchcombe (1975) points out, much of Merton's work focuses on situations involving a choice between socially institutionalised alternatives, and with the possibility of ironic and/or latent consequences flowing from whatever choice is actually made. One aspect of this approach is the necessity of understanding the 'definition of the situation' or the 'frame of reference' individuals bring to a situation, concepts Merton drew directly from W. I. Thomas and George Herbert Mead respectively. It was this that made a form of interviewing focusing on the respondent's 'personal context', and capable of eliciting subjective understandings of specific social situations important to Merton's overall project. Interviewing was also seen as valuable because it could form a basis for asserting that the consequences of some action were unanticipated. In addition, interviewing could throw up unexpected findings⁶.

⁵ Simonson (2005) notes that even before the war Merton had developed an interest in propaganda, an interest accelerated for him, given his Jewish ancestry, by a trip to Austria and Germany in 1937.

⁶ The ability to point to unexpected findings had an important rhetorical purpose. It could be used to undermine the criticism that the findings of sociological research were commonsensical.

Reception of *The Focused Interview*

There is by now a very extensive body of work devoted to the study of citations in scholarly literature⁷. One common approach, ‘citation context analysis’ (Small 1982), involves scrutiny of the text immediately surrounding citations usually as the basis for locating the citation within some system of classification. A plethora of such classification schemes now exists (see e.g. Moravcsik and Murugesan 1975; Chubin and Moitra 1975; Mizruchi and Fein 1999; Hanney et al. 2005; Golden-Biddle et al. 2006). Although they vary a great deal in their detail, most such schemes, as Small points out, distinguish citations of a relatively ‘inconsequential’ kind from those making more substantial reference to a cited work. Typically, too, positive references are distinguished from negative ones, and putative uses of the cited work in the citing article are identified.

A number of studies have used the content of citations to study the reception of particular authors and their work. Anderson (2006) has looked at how a number of the concepts found within Karl Weick’s (1969, 1979) *The Social Psychology of Organizing* have been differentially used within the field of organization studies, while in a similar vein Mizruchi and Fein (1999) have examined the fate of a classic article in organisational theory by DiMaggio and Powell (1983). Lounsbury and Carberry (2005) have examined how patterns of citation by organisational scholars to Max Weber’s work have shifted over time in ways that increasingly accord Weber honorific status at the expense of his conceptual contribution. To date, however, attention has been focused on theoretical work; citation content analyses of methodological works are notable for their absence.

Over a number of years Merton had a close association with Eugene Garfield, founder of the Institute for Scientific Information and originator of the *Science Citation Index* and the *Social Science Citation Index* (Garfield 2004). As a tribute to Merton, Garfield has made publicly available on his website bibliometric data on Merton’s writings⁸, including citations to Merton et al’s book *The Focused Interview*. In what follows, citations to Merton et al (1956) are used to look at the academic reception of their work between 1956 and 1977. Merton et al’s work continues to be cited, of course, after 1977. The relatively early cut-off point was deliberately chosen, however, to encompass a period before focus groups became popular in sociology.

According to the HistCite data, the 1956 edition of *The Focused Interview* received 70 citations between 1956 and 1977 in journals indexed in the *Social*

⁷ One strand of citation-based research examines, usually in a quantitative way, topics such as the extent to which particular works are cited in other works, trends in citation, and patterns of co-citation. Here, the link between one document and another is used as an indicator of how the citing work is related to the cited. (Borgman and Furner 2002). Indicators of this kind have a broad spectrum of use, including assessments of the impact of particular authors, and the intellectual mapping of particular fields and disciplines. As Borgman and Furner point out, work of this kind can, and often does, have an evaluative component leading to the distribution of resources and rewards for individuals, fields, and institutions based on the ranking of indicators. A second strand of research tends to be focused on the act of citation itself, often seeking to uncover or impute the motivations associated with the decision to cite a particular work. Some writers have addressed such matters by directly questioning authors about their citing practices (see, e.g., Shadish et al. 1995).

⁸ http://garfield.library.upenn.edu/histcomp/merton_focus-inter/.

Science Citation Index. Figures provided in Garfield (1980) place *The Focused Interview* joint 22nd out of 29 in a list of Merton's work cited 5 or more times in the *Social Science Citation Index* between 1969 and 1977. (For the reception of Merton's work more generally, see Crothers 1987.) Table 1 shows the distribution of articles containing citations by discipline (using SSCI subject categories) and by whether the citing article was judged to be a review, a methodological article, or an article on a substantive topic.

What might seem surprising is that only 14% of citing articles were in Sociology. However, it seems likely that this merely reflects the greater extra-disciplinary reach of books as opposed to articles. Comparing rates of citation in the *Social Science Citation Index* for both books and journal articles, Sullivan (1994) and Clemens et al. (1995) found that books were cited more often than articles. Clemens et al. also note that the books they examined, all of which had been nominated for a major prize in Sociology, received the majority of their citations from outside the discipline. In all, *The Focused Interview* was cited in 20 different disciplinary areas not including Sociology. This compares favourably with the maximum number of citing disciplines for the most well-cited books in the Clemens et al sample using a

Table 1 *The Focused Interview*: citations by discipline, 1956–77

Discipline	Review	Methodological article	Substantive article	All	%
Anthropology	1	1	–	2	3
Business	–	–	2	2	3
Communication	–	1	1	2	3
Criminology	–	1	–	1	1
Demography	–	–	1	1	1
Education & Educational Research	1	2	6	9	13
Family Studies	–	2	4	6	9
Health Care Sciences & Services	–	3	2	5	7
Health Policy & Services	1	–	1	2	3
Information Science & Library Science	–	–	1	1	1
Journalism	1	1	1	3	4
Law	–	1	2	3	4
Management	1	2	2	5	7
Market Research	1	–	–	1	1
Operations Research & Management Science	–	1	–	1	0
Planning & Development	–	–	1	1	1
Political Science	–	–	2	2	3
Psychology	2	3	3	8	12
Research Methods	–	2	–	2	3
Social Sciences, Interdisciplinary	–	1	–	1	1
Social Work	–	–	2	2	3
Sociology	4	2	4	10	14
All	12	23	35	70	100

slightly different disciplinary classification. Table 1 also shows that 11 out of the 70 citations to *The Focused Interview* between 1956 and 1977 were in the fields of business, management, and market research, although it is notable in the light of subsequent developments that there was only 1 citation in the market research category.

Book reviews, despite their relatively low status, have a useful role in the evaluation of new work (Snizek and Fuhrman 1979; Hartley 2006). Looking at the 12 reviews received by *The Focused Interview*, one can see that almost all reviewers mentioned the book's provenance as a training manual for interviewers at the Bureau of Applied Social Research. None, however, saw the book as being mainly about interviewing groups. Although reference was made to this feature of the method, it was seen for the most part as being separate and largely subsidiary to the main purpose of the book. In general, reviewers in applied fields such as journalism (Brinton 1956), speech (Carter 1956), or marketing (Mulvihill 1956) saw the approach to interviewing described in the book as useful although perhaps technically demanding. On the other hand, writers in disciplines cognate to sociology tended to stress issues of methodological fit. Both John Landgraf, writing in the *American Anthropologist* (1957), and Charles McClintock, in *Contemporary Psychology* (1957), evaluated focused interviewing against the methods dominant in their own fields, finding it to have potential but somewhat limited utility, in both cases.

Sociologists were generally welcoming, if somewhat ambivalent. Both Paul Price's review in *Rural Sociology* and the perfunctory review in *Sociology and Social Research* by Emory Bogardus (1957), were very largely exegetical, although in the final paragraph Price did commend the book as "a valuable addition to the methodology of sociology and social-psychology" (1956, 317). Richard Morris (1957), evaluating the usefulness of the book for students, saw it as somewhat jargon-laden and felt that its wartime origins made it somewhat dated. In addition, he thought its status as a training manual created the danger of its being used as a cookbook, although Morris commended its potential effectiveness in encouraging students to avoid bad practice. Writing in *Social Forces*, J. Mayone Stycos (1957) also saw *The Focused Interview* as a work that could be used either straightforwardly as an instruction manual or as a technical treatise. While he emphasises the origin of the techniques described in the book in research practice, he saw them lacking in the kind of validation that might come from assessing experimentally the utility of particular procedures. One can, perhaps, again see here an implication that the book was regarded as having failed to keep up with recent developments.

Articles citing *The Focused Interview*, other than reviews, were classified into two groups, those that dealt with methodological topics, and those of a more substantive kind. In all, 23 articles fell into the methodological category, 34 into the substantive group. (One substantive article could not be located.) Most of the methodological articles cited Merton et al's work on the focused interview in a 'perfunctory' way (Moravcsik and Murugesan 1975; Small 1982). That is, only very brief mention was made of the cited text, with the citation often occurring as one of a number of references all addressing the same point. Despite this, it remains possible to glean from these brief mentions of Merton et al's text something of how the focused interview was perceived by citing authors. The method was usually mentioned in

relation to passages in the citing article concerning the elicitation of subjective experience, often but not always experiences that had occurred in the past.

Only three of the methodological papers cited Merton et al's work in an 'integral' way addressing in more than a superficial manner the substance of the material presented in the book. Even here, however, discussion was not extensive. Summarising Merton et al's discussion of the issue, Weaver (1970) rehearses the advantages and disadvantages of using group interviews within the context of research on 'illness referral systems' among Spanish Americans in New Mexico. Weaver's is one of only two methodological articles that discusses interviewing in groups. (The other, by Van de Vall, refers merely to focused interviewing as one of a number of "older techniques" (1975, 26) without any further elaboration.) Dohrenwend and Richardson (1963) locate Merton et al's work in relation to discussions about the role of directivity in interviewing, and indicate its utility for eliciting information about the experiences and feelings of the respondent. Brown and Rutter (1966) mention the book in relation to the detailed recall of past events. It is perhaps worth noting that Dohrenwend and Richardson and Brown and Rutter subsequently made substantial contributions to the field of psychiatric epidemiology. This is an area where, for a time, there was controversy about the role of lay interviewers, and the efficacy of interviewing as a method for eliciting information about individuals' mental health (Paykel 2001). Work on the focused interview did, it would seem, provide evidence that non-clinically trained interviewers could reliably collect data about subjective feelings and past experiences, opening up possibilities for research on biographical transitions and emotional states.

Of the 34 articles dealing with substantive, rather than methodological, topics all except four reported an empirical study. The remaining 30 articles were classified into three categories, 'identification', 'description', and 'articulation', depending on how the focused interview was designated. The first category, 'identification', refers to situations where the focused interview was described as the method of data collection without any further elaboration; 22 out of the 29 articles fell into this category. In a further six articles, a brief description of the method was given. A further single article (DeWeese 1972) went beyond description to articulate a somewhat more extended account of the method and its relationship to the topic under investigation. Out of the 30 articles, only two involved the use of group interviewing, the remainder involved the interviewing of individuals (or, as in two cases, couples). In 21 of the 29 articles, interviewing was the only data collection method used. There were no cases in the articles examined of focused interviewing being used for the piloting of a subsequently-used survey instrument. It is of interest to note, however, that in eight cases, focused interviewing was used to elicit reactions to a task that had previously been performed or to material already presented to respondents. In a number of instances work of this kind had been undertaken by researchers evaluating educational innovations (Geier 1967; Francois 1968; Feigenbaum 1973; Hall and Loucks 1977). It should be noted though that in all of these cases the post-stimulus interview was conducted with individuals; groups were not used. Indeed, it might be argued that twenty years after Merton et al's work was published, *its relevance to group interviewing remained largely invisible*.

Cole (1975) found that a substantial proportion of citations to Merton's work on the sociology of deviance had a 'ceremonial' character. In his view, authors used

such citations as a to legitimate their own work by associating it with that of someone well-known and prestigious in the field. It would seem that something similar occurs in relation to Merton et al's work on the focused interview. It is interesting to note in this context that the concerns expressed by some reviewers that the methods set out by Merton et al might be somewhat dated or overly technical do not by and large surface in substantive studies reporting use of focused interviews to collect data. Moreover, it is probably no coincidence that the substantive areas in which Merton et al's work is most often cited are family studies, education, and health studies, all areas where structural functionalism as a theoretical orientation, and presumably as a result Merton's visibility and prestige, had previously been strong (Morgan 1985; Burr et al. 1979, 5–6; Burgess 1986, 11–12; Bloom 2002).

It is clear that diffusion of the focused interview within sociology was 'carried' to some extent on Merton's prestige. Quite possibly, however, prestige can have a negative effect on reception where a particular work is seen to be anomalous within an author's wider body of writing. Calhoun and VanAntwerpen (2007) point out that Merton is often tagged, along with Talcott Parsons and Paul Lazarsfeld, as one of the high priests of what became known as 'mainstream' or 'Establishment' sociology. In their view, this obscures the extent to which he can be seen as having a 'craft orientation' towards sociological work. In other words, an important component of Merton's work was the extent to which he was interested in developing tools, mostly of a conceptual but also of a more technical kind like the focused interview, that would allow sociologists to conduct theoretically informed and methodologically sound work on relatively delimited areas of social life. It might be possible to argue that as time went on this aspect of Merton's work became subsumed under his wider identity as structural-functionalist theorist, making his work on interviewing less visible.

Diffusion into Marketing Research

As Merton (1987) makes clear, the reception of an idea depends on the social and cultural climate within which it is received, the social networks through which it diffuses, and the shifts in meaning and use that occur as diffusion occurs. Obviously, first hand accounts from those involved in the spread and use of focus group methods would be highly desirable. With the passage of time, however, the prospects of an oral history approach of this kind have sharply diminished. The lack of a suitable sampling frame combined with the retirement and death of those most likely to have relevant information make an alternative approach based on online research preferable. One difficulty is that, useful as citation indexing is for assessing the impact of Merton et al's work in academic social science, it has much less utility when it comes to exploring how and in what ways that work affected research practice in the fields of marketing and advertising. As Levy (2005, 342) notes, much of the research carried out on consumer behaviour in the 1940s and 50s was proprietary in nature and was not reported in published form. Even where scope for publication existed, tracing patterns of intellectual influence can remain difficult. Reviewing the history of the *Journal of Marketing*, Kerin (1996) notes that, while it began publication in 1936 and remained the only journal in the field until 1964,

formal criteria for the acceptance of articles were not established until 1954. Moreover, it was only in the late 1970s that the journal was explicitly reconfigured as a scholarly journal rather than as one that was at least partly oriented to practitioner concerns. It is not surprising to discover, therefore, that norms relating to referencing and citation developed relatively late in the field.

In the absence of citation data, one has to turn to full-text databases. Baumgartner and Pieters (2003) have identified a comprehensive list of 49 marketing or marketing-related journals, 22 of which were published before 1980 (Table 2). All of these journals were available for electronic searching via JStor, Business Source Premier, or Periodicals Archive Online. Much of the account that follows derives from searches of these journals for relevant terms. Such terms included: focus group, focused interview, focussed interview, focused group interview, focussed group interview, and group interview. Additional searches were conducted for Merton himself, his collaborators, Marjorie Fiske (Lowenthal) and Patricia Kendall (Lazarsfeld), and the Bureau of Applied Social Research where much of the development of the focused interview was carried out.

While JStor and the like provide good coverage of the journal literature, resources of two kinds especially useful for following trends, trade magazines and directories (Webb et al. 1966), remain relatively inaccessible to online searching. Magazines, such as *Advertising Age* and the (now defunct) *Printers' Ink*, have not been digitised for the period of most relevance to the present article. In addition, trade directories

Table 2 Marketing journals published prior to 1980

Advances in consumer research
Business horizons
California management review
Decision sciences
European journal of marketing
Harvard business review
Industrial marketing management
Journal of advertising
Journal of advertising research
Journal of business
Journal of business logistics
Journal of consumer affairs
Journal of consumer research
Journal of international business studies
Journal of marketing
Journal of marketing education
Journal of marketing research
Journal of retailing
Journal of the academy of marketing science
Journal of the market research society
Management science
Sloan management review

have now moved online. Doing so makes them easy to keep up to date and obviates the need for the physical storage of bulky reference works. Rarely, however, are older volumes digitised, rendering as a result sources of this kind less useful for research into the past. On the other hand, Google Scholar and Google Book Search make possible the identification of possibly relevant sources, such as out-of-print textbooks, although these are rarely fully searchable.

The Interview in Marketing Research

In the late 1940s and early 1950s subcommittees of the Marketing Research Techniques Committee of the American Marketing Association produced a number of reports on the research methods then in use in marketing research. Where these reports discuss qualitative interviewing (Blankenship et al. 1949; Woodward et al. 1950; see also Paradise and Blankenship 1951), it is clear that they assume the researcher is interviewing an individual respondent; interviewing respondents in groups is not mentioned. Shapiro's comment in 1952 that the "group interview would appear ... to be deserving of more extensive use than is now true" also conveys the sense that the method at this time was not widely used, and perhaps was seen as not quite legitimate. As the 1950s progressed, consumer researchers in a number of different contexts and locales began to make use of group interviewing (Goldman and McDonald 1987). Some of this activity seems to have involved a degree of ad hoc experimentation driven, as often as not, by exigency, convenience, or happenstance⁹. Where such work was underpinned by more explicit theoretical or methodological ideas, these derived from social psychological research on small groups or clinical psychology (see, e.g., Goldman 1962). One factor that might be relevant here is that in the post-war period the Veterans Administration in the US provided financial support for training in clinical psychology. This led to a substantial increase in the number of clinical psychologists (Krugman 1956; Cranston 1986), some of whom presumably found employment in marketing research.

Where was the influence of Merton and his colleagues in all of this? After the war Marjorie Fiske, one of the co-authors of *The Focused Interview*, had with Leo Handel described the wartime work of the Bureau in a series of articles in the *Journal of Marketing*, including one which dealt in some detail with focused interviewing (Fiske and Handel 1947). In addition, as David Morrison (1998, 138–40) points out, the reputations enjoyed by Lazarsfeld, Merton, and the Bureau of Applied Social Research in the post-war period meant that their work was highly likely to be visible to the marketing community. Nevertheless, Fiske and Handel's article aside, direct mention of the focused interview or Merton and his collaborators is difficult to find in the marketing literature in the 1940s and 50s. Dissemination of Merton et al's work on the focused interview, when it occurred, did so at a slightly later point and from within the marketing research community itself. A key figure in this dissemination would seem to have been George Horsley Smith¹⁰.

⁹ Although the sociologist Emory Bogardus had made use of group interviewing in the 1920s, this seems largely to have been for reasons of convenience rather than being an explicit methodological choice. (On Bogardus and the interview more generally, see Lee 2008b).

¹⁰ See also Stewart et al. 2006.

Biographical information on Smith is sparse. Information gleaned from his various publications suggests that he served on the faculty at George Washington University before moving to Princeton sometime in the 1940s. Smith subsequently moved to Rutgers where he was a Professor of Psychology. While at Princeton he had some degree of affiliation with Hadley Cantril's Office of Public Opinion Research, and evidently helped in the editing of *Public Opinion Quarterly*. (On this last point, see Davison 1987.) He, thus, had every reason to be familiar with the work of Lazarsfeld, Merton, and the Bureau of Applied Social Research.

In 1954 Smith published a textbook called *Motivation Research in Advertising and Marketing*. Published under the auspices of the American Marketing Association, the book attracted favourable comment from Lazarsfeld (1972), and was an important source for Vance Packard's (1957) best-selling book on the advertising industry, *The Hidden Persuaders* (Nelson 2008). Smith's book was evidently intended as something of a tool-kit for advertising researchers, discussing interviewing techniques and a wide range of projective techniques. Its title and content reflected the importance at the time of what became known as 'Motivation Research' (MR). Enjoying something of a vogue in the 1950s, MR sought to understand the psychological bases of consumer choice. Although in many ways Paul Lazarsfeld might be considered as the rightful progenitor of Motivation Research, (Fullerton 2007; Tadjewski 2006), its best known practitioner was Lazarsfeld's fellow Viennese émigré, Ernest Dichter. Trading on the cultural status attained by psychoanalytic ideas in the post-war United States, Dichter pointed to ways in which the unconscious was implicated in buying behaviour, and, in what was then still a relatively prudish society, emphasised the sexual connotations surrounding the shape, texture, and use of products. Methodologically speaking the tools of motivation research were depth interviews—including group interviews—direct observation, and projective tests.

Over time motivation research saw a fairly sharp decline in its popularity. In part, the approach was probably undermined from within by Dichter's own hyperbolic claims for its efficacy (Collins and Montgomery 1970). Commercial rivalries and professional jealousies also played their part (Fullerton 2007). Moving towards the 1960s, the intellectual climate shifted in the direction of the new behavioural science methods that were then becoming popular (Newman 1992; Tadjewski 2006). This further highlighted long-standing concerns among critics of MR about its ability to capture deep rather than surface meanings, to adequately predict actual consumer behaviour, and about the practicalities associated with the collection, management and analysis of motivational data.

Drawing on the mimeographed second edition of the manual on focused interviewing then in use by the Bureau of Applied Social Research in 1952¹¹, Smith discusses Merton et al's work on the focused interview both in relation to interviewing individuals and working with groups. In the early 1950s Smith had experimented with group interviewing while at Grey Advertising Agency in New York. He subsequently developed an association with the Dancer, Fitzgerald, Sample agency. While at Dancer, Fitzgerald, Sample, Smith began to encourage use of the 'focussed group interview' as he called it, experimenting with the method to identify how it might be used most appropriately (Borsky et al. 1955). A brief description of

¹¹ Thus his use of 'focussed' rather than 'focused'.

the work Smith conducted at Dancer, Fitzgerald, Sample is contained in a summary of a paper he presented at the tenth annual conference of the American Association for Public Opinion Research in 1955 (Borsky et al. 1955). Smith argued that the focused group interview provided a useful device that produced “a solid picture of the product in relation to the consumer” and allowed advertisers to speak to consumers in their own language. The method was quick and could be undertaken by agency personnel without the involvement of a trained psychologist. While he acknowledged that the approach did not lend itself to quantification, Smith argued that this was not necessarily a disadvantage when the purpose of the method was an exploratory one. In any case, experience suggested that there was sufficient patterning in the results from different groups to suggest a degree of reliability in the data. For Smith, in other words, focused group interviewing allowed researchers insight into consumer motivations but did so without the operational disadvantages and psychoanalytic baggage associated with motivation research.

Emergence of the Term ‘focus group’

The term ‘focus group interview’ as opposed to ‘focused’ or ‘focussed’ group interview seems to have appeared in the 1960s. The *Oxford English Dictionary Online* gives as a first sighting of the term in its modern sense an advertisement for “a professional marketing researcher” who was required to be “... familiar with store audits, focus group interviews and questionnaire design” that appeared in *The New York Times* in August 1965. But some earlier examples can also be found. One early use is in an article in the automotive trade magazine *Automobile Topics* in December 1961. The article (Anonymous 1961) refers to the development of an advertising campaign by the car-maker Dodge for the subsequent introduction of the Dodge Dart in 1962¹². Dodge and its advertising agency Batten, Barton, Durstine & Osborn (BBDO) had used an (unnamed) independent research organisation to obtain reactions to a film showing the as yet unreleased Dart from car owners in 10 major cities across the United States. The reactions were recorded in the course of what the article calls ‘an unusual “Focus-Group Interviewing” project,’ a phrase suggesting the term was indeed novel at the time. A similar usage can be found in Lucas and Britt’s (1963) textbook, *Measuring Advertising Effectiveness*. They comment that, “Both the Leo Burnett Company and Batten, Barton, Durstine, and Osborn, Inc., as well as certain other advertising agencies, use focus-group interviews ... and find them valuable ...” (Lucas and Britt 1963, 142).

Commenting on the influence of Merton’s work on development of the focus group, Everett Rogers suggests that the phrase ‘focused group interview’ eventually became ‘focus group’ as the result of “everyday use by market researchers” (Rogers 1997, 279). In other words, just as ‘iced cream’ became ‘ice cream’ the transition from ‘focused group’ to ‘focus group’ probably involved an element of straightforward linguistic change.¹³ Purely linguistic considerations aside, one

¹² I am grateful to Kristina Eden of the Michigan Information Transfer Source facility at the University of Michigan for help in locating and acquiring this article.

¹³ If Rogers is right, there might well be some significance to use of the hybrid form ‘focus-group interview.’ Hyphenation, here, presumably both stands for and replaces the inflexional suffix ‘-ed’.

interesting feature of these early mentions of ‘focus group interviews’ is that they might reflect the beginnings of a shift of emphasis away from procedural aspects of the method, i.e., the *focused* nature of an interview, and towards its compositional character, the *focus group*. This is largely conjectural, of course, but it is perhaps worth noting that both in the *Automobile Topics* article and Lucas and Britt’s textbook focus groups are associated with the use of ‘consumer panels’ as a recruitment device. Although the article on the Dodge Dart, as one might expect, contains little methodological detail, it refers to ‘car-owner panels’ as being the source for the focus group participants. Like other major advertising agencies, BBDO maintained its own consumer panels at both national and local level (Lucas and Britt 1950). Panels were made up of representative samples of households which kept detailed diaries of consumer purchases (1950, 147). According to Lucas and Britt, BBDO’s local panels were used in a broad way with members “... sometimes joining in studio meetings for reactions to radio and television programs and advertising copy” (1963, 142). Lucas and Britt seem to suggest, that by the early 1960s, this practice had become more widespread, and was tied to the recruitment of focus group participants¹⁴.

Focus Group Practice

While the published literature points to the methodological shifts that surrounded interviewing in groups, how focus group methods were applied in practice is rather more difficult to discern. The Tobacco Industry Documents provide a useful resource for gaining some insight into this question. These documents are an example of the kind of data potentially available through what Gary Marx has called ‘institutional discovery mechanisms’ (1984, 78), the processes by which information comes into the public domain through the activities of investigative, legislative and judicial bodies. Marx, who argues social scientists should make more use of such data, points, for example, to the use of evidence presented to US Senate committee hearings on anti-trust violations by researchers studying white-collar crime (Geis 1968; Baker and Faulkner 1991). Very large volumes of previously secret tobacco company documents have been made public as the result of settlements reached to litigation between the tobacco industry and a number of US states, health insurers, and private individuals, (Givel and Glantz 2004). Increasingly made available on the Internet in a form that permits free text searching, the documents, going back some 50 years, provide a remarkable insight into the workings of the industry (Bero 2003)¹⁵. How tobacco was advertised and how specific groups of potential consumers—including women, young people, and members of particular ethnic groups—were

¹⁴ One can probably dismiss as unlikely a possible reason for use of the term ‘focus group’ at BBDO. Alex Osborn, one of the founders of BBDO and originator of the technique of ‘brainstorming’, was a fervent admirer of Winston Churchill (Osborn 1948, 116). During the 1930s Churchill was a member of an anti-Nazi organisation sometimes called ‘The Focus Group’ (see Nicolson 1966, 327). The existence of this group, more properly called ‘Focus in Defence of Freedom and Peace’ was not disclosed publicly until 1963 (Addison 1993).

¹⁵ Tobacco industry documents have been used for academic research, as well as for investigative and advocacy purposes. In many cases, researchers have used the material to explore the various ways in which tobacco companies acted to deflect criticism and hinder regulation, often using deceptive or manipulative tactics (MacKenzie et al. 2003).

targeted formed important aspects of the litigation. As a result, many of the documents that have been released deal with the relationship between tobacco companies and advertising and marketing research agencies¹⁶.

A major online repository for the Tobacco Industry Documents, The Legacy Tobacco Documents Library at the University of California, San Francisco¹⁷, was searched for the period 1950 to 1980 for the terms ‘focus group’, ‘focused group’, ‘focussed group’, and ‘group interview’ (this last with the previous two terms excluded). Because of issues relating to the reliable dating of documents, a conservative policy was adopted of ignoring any document that could not be reliably dated from the information contained within it. Because the UCSF site contains a variety of resources, including multimedia files and trial depositions, only the so-called ‘Master Settlement Agreement’ (MSA) collection plus documents from Liggett & Myers, a tobacco company not included in the Agreement, were searched.

Table 3 shows that the term ‘group interview’ appears for the first time in the Tobacco Industry Documents in a proposal by Ernest Dichter for a “Motivational Research Study of Consumer Attitudes towards Dual Filter Tareyton” dated January, 1961. The proposal has a strongly psychoanalytic character seeking to understand unconscious motivations surrounding different types and brands of cigarettes. Group interviews were to be used, as well as individual depth interviews, projective tests, and psychometric tests (Dichter 1961). It is of interest that the first document in which the term ‘focus group’ appears is a proposal produced in October 1965 for the American Tobacco Company by the Research Department of the advertising agency Batten, Barton, Durstine & Osborn (Batten Barton 1965). This, of course, was the agency previously mentioned in relation to the Dodge Dart study. The document does not refer to focus groups in a way that suggests them to be novel or unusual in any way. It characterises them primarily as a diagnostic tool for interpreting why changes in elements such as brand share might have occurred. The putatively older terms ‘focused group interview’ and ‘focussed group interview’ only make their first appearance in the documents in 1965 and 1967 respectively¹⁸. While this potentially challenges the view that the term ‘focus group’ evolved from these older terms, there is a suggestion in the documents that these were terms more commonly used by smaller, specialised agencies. In other words, some of

¹⁶ Use of the Tobacco Industry Documents for research purposes can be methodologically challenging (Bero 2003; Carter 2005). Retrieved document sets are not always complete and, given the operation of the litigation process, are subject to a degree of selection bias relative to the total universe of documents. There is no reason to suppose, however, that there is any particular bias in the documents in relation to discussions of particular research methods. Somewhat more problematic are the issues surrounding the dating of documents. Based on figures in Kretzschmar et al. (2004), around 2% of documents are undated. Misdating of documents also occurs. The extent of misdating is unclear although it likely to be at a level that is more than merely trivial. The volume of documents returned by a given search can be extremely large, but is likely to contain much material that is redundant. Since the documents were obtained as part of a litigation process, multiple copies of the same document are common. For example, a document circulated to a number of parties might be produced in relation to each individual as a product of the discovery process. This level of redundancy makes management of the documents and quantitative analysis of them problematic. Material can also sometimes be compromised by the poor quality of optical character recognition in some of the scanned documents. Again, such difficulties are unlikely to have produced any marked degree of systematic bias.

¹⁷ <http://legacy.library.ucsf.edu/>

¹⁸ A document on focused group interviews estimated by indexers to date from 1963 was also found, but contained no independent corroborating evidence for its date.

Table 3 Group interviewing methods: first mention, tobacco industry documents

Term used	Year	Document author	Agency	Tobacco company	Document title	Hits 1950–1980
Group interview	1961	Ernest Dichter	Institute of Motivational Research	American Tobacco	A Proposal For A Motivational Research Study Of Consumer Attitudes Towards Dual Filter Tareyton	233 documents
Focus group	1965	N.A.	Batten, Barton, Durstine & Osborn	American Tobacco	Recommended Research Philosophy	4947 documents
Focused group interview	1965	Ollie G. Crump	Selected Area Surveys	R. J. Reynolds	Proposal for a study of Black smokers	396 documents
Focussed group interview	1967	Harvey Queen	Queen Applied Research	R. J. Reynolds	Reactions to Super King Size Winston Cigarettes in Kansas City.	228 documents

the differentiation in terminology reflected practice in different agencies. Moreover, there is evidence that once the term ‘focus group’ came into use it began to be substituted for other terms. For example, a document containing a series of reports by the marketing department of the RJ Reynolds tobacco company on the packaging of Winston and Salem cigarettes speaks of group discussions in the earliest report in 1969, but by 1971 is using the term focus group (RJR 1969). One can also find Edward Simon, an interviewing consultant used by a number of companies, progressing over the course of a series of different documents from speaking of group discussions to focussed group interviews to focus groups.

In terms of billings (a measure of gross income), BBDO was the second largest American advertising agency during the 1960s (Fox 1997, 331–2). One might suppose that if ‘focus group’ had become a house term within BBDO and perhaps other agencies by this time, their size and status might have encouraged diffusion of the usage within the wider world of marketing research at the expense of older terms. Table 3 shows that, relative to other terms the term ‘focus group’ was used substantially more in the documents searched than the other terms. The figures do not represent the number of *studies* using the method at a given time, but the number of times the method is *mentioned* in the documents. Duplication in the documents produces multiple counting. It is unlikely, however, that this would account solely for the substantial level of focus group mentions relative to the use of other terms.

Table 4 shows the number of documents containing the term ‘focus group’ for four time periods from 1965 to 1984. There appears to be quite a marked rise over the time period, especially after 1974. The problems relating to multiple counting just mentioned still apply. Nevertheless, the change from 48 search ‘hits’ in 1965–69 to over 5000 in 1980–84 is striking¹⁹.

¹⁹ It is difficult to decide what the most appropriate base figure for comparison purposes might be here. The total number of documents in the database for each time period is as follows: 1965–69: 178,439; 1970–74: 273,766; 1975–79, 526,751; 1980–84, 720,630.

Table 4 Focus groups: mentions, tobacco industry documents, 1965–1984

Year	Document hits
1965–69	48
1970–74	658
1975–79	4008
1980–84	5365

The Growth of Focus Groups

Why did focus groups grow rapidly in popularity from the 1970s onwards? In the case of the tobacco industry, rising concern about health issues following publication of the US Surgeon General's report on smoking and health in 1964 led tobacco companies to introduce lower tar cigarettes, and encouraged attempts at market segmentation by targeting groups such as young people and women. In this context focus groups played a role alongside other techniques in understanding how consumers responded to new products and new packaging concepts (on pack design see, e.g., Wakefield et al. 2002). Factors specific to particular industries might also have played a role in other areas too. In the late 1960s it became clear to executives in the television industry that news programming could drive audience share. Allen (2001) notes that the development of news formats that were novel at that time, including among others the use of female newscasters, involved the use of focus group research. The 1960s also saw the advent of retail scanning technologies (see Mayer and Mason 1976). This gave companies an effective tool for rapidly monitoring the impact of advertising and promotion without recourse to survey methods. Some sources have suggested (Harvey n. d.; Young 2001) that this indirectly encouraged the use of qualitative techniques such as focus groups as a means of uncovering reasons lying behind shifts in sales patterns.

It is likely, though, that the major factor encouraging the use of focus groups around this time was the state of the economy. The early 1970s saw a sharp recession in the United States. The advertising industry and companies offering research services were beset by layoffs, often of quite experienced staff (Bland 1971), and the use of freelancers became common (Nelson 1971). These are conditions which might have been expected to encourage growth in the use of focus groups. Since focus groups are a relatively cost-effective way of gathering qualitative data, they are likely to have appealed to companies looking to reduce research budgets. In a tight economic climate those who had the skills to conduct focus group research, or who could acquire them, might well have had opportunities for freelancing, consultancy or local work denied to those needing a more substantial infrastructure for research.

As Szybillo and Berger's (1979) survey of advertising research executives makes clear, by the end of the 1970s focus groups had become widely used in advertising agencies for purposes such as questionnaire development, the preliminary evaluation of advertising materials, the development of new products and advertisements, and for consultation with prospective clients. In these contexts focus groups were valued for their speed, flexibility and low cost, and for the access they were seen to provide to consumers' own understandings and language when evaluating actual or potential

products. By this time, too, methodological discussion of focus groups, which had remained sparse in the earlier part of the decade, began to feature more prominently in the consumer research literature. (A number of relevant articles can be found in Higginbotham and Cox 1979.)

Focus Group Methodology

Within the marketing research literature of the 1970s focus groups began to be positioned as part of the wider qualitative research tradition (see, e.g. Calder 1977). What is noticeable at this juncture, though, is a relative lack of methodological polemic, especially in comparison with the debates surrounding quantitative and qualitative methods in sociology around the same time or earlier controversies about motivation research in marketing. Rather, the literature concerns itself for the most part with the practicalities and technicalities of focus group research and the strengths and limitations of the method in the process. To put this another way, focus groups seem at this time to have been framed largely in terms of ‘fitness for purpose’ and as complementary to rather than competitive with quantitative methods. To the extent that focus groups are critiqued on methodological grounds in this period it is on the basis that proponents of the method lack a thorough grounding in the social psychology of groups (see, e.g., Yoell 1974).

Merton (1987) records that in the 1970s he did occasionally receive enquiries about the reproduction of materials, by then long out-of-print, relating to the focused interview. This, and some other scattered references to *The Focused Interview* (see, e.g. Bellenger et al. 1976), suggest that the link between the Merton et al’s work and the focus group had not become completely invisible around this time. For the most part, however, reference to Merton and his colleagues is notable by its absence from the published literature on focus groups in the 1970s. Indeed, their work seems to have been sufficiently forgotten that Axelrod (1975) could explicitly lament the lack of available training materials or textbooks available to focus group moderators.

It is possible that what lay behind Axelrod’s complaint was a concern about the professional status of focus group moderators. Abbott (1988, 234) points out that moves towards professionalisation were a feature of marketing research in the 1970s. Proponents called for the establishment of a variety of formal mechanisms seen as emblematic of professional status. These included licensing, accreditation, the development of an ethical code, and the specification of knowledge requirements for professional practice (see, e.g., Coe and Coe 1976). Abbott also observes that such strategies were only partly successful since the field was a relatively permeable one in terms of expertise and recruitment. Indeed, one might argue that it was both the growing institutionalisation of focus group research and the flow of newer and less experienced entrants to the field that helped to crystallise issues surrounding professional practice.

Lezaun (2007) argues that the contemporary technical literature on focus groups—training manuals, handbooks, and so on—tends to portray the moderator as a rather charismatic figure skillfully orchestrating the ebb and flow of focus group discussions in the face of possible distractions and disruptions from

participants, setting and clients²⁰. It is clear that this conception of the moderator had already begun to develop in the 1970s. Existing practitioners poised somewhat between technical fields such as operations research and market modelling, on the one hand, and the more creative areas of copy writing and art production, on the other, began to emphasise experience and command of the many facets of the moderator's role as claims to professional status (see, e.g. Axelrod 1975; Payne 1976). One might assume that doing so allowed them to manage and potentially neutralise the competitive threat from less established practitioners. In addition, a style of moderation premised on an orchestrated engagement with participants could be seen as compatible with the phenomenologically-oriented approaches then becoming fashionable in the social sciences (Calder 1977, 359). Parallels with contemporary and somewhat modish manifestations of the counter-culture such as 'rap sessions' and encounter groups were also not entirely unnoticed (Wainwright 1975). It is possible to conjecture that, in this context, there might have been little need to invoke an origin myth or a founding figure. (On origin myths and methodological traditions, see Platt 1983.) Dichter's star had waned. Merton perhaps suffered the double penalty of being an academic uninterested in consumers per se but also one who was associated with an organisation that was a potential competitor for research funding. The heroes of the advertising and marketing industries tended to be larger-than-life charismatic figures who had built empires often on little more than wit, talent or enterprise (Fox 1997). In some respects Lazarsfeld fitted this mould rather well but by this time he was well and truly associated with quantitative methods.

Re-entry into Academic Research

The detailed history of the focus group once it was reintroduced into sociology is beyond the scope of this article. However, a few brief comments about the process of re-entry are in order. In what Robert Merton would almost certainly would have regarded as an example of serendipitous discovery (Merton and Barber 2004), David Morgan, one of the early proponents of focus groups in sociology, records that he and his collaborator Margaret Spanish first heard of the method from a friend who was completing an MBA. She suggested that research techniques used in the field of marketing might be useful for a study Morgan and Spanish were contemplating on people's thinking about heart attacks (Morgan 1988, 7). It should be noted, though, that if by that time focus groups remained relatively unknown among social

²⁰ Focused interviewing was scaleable, not just in the sense that it could be applied to groups as well as individuals, but in that it could also be utilised, in effect, on an industrial scale. This, of course, required an infrastructure for conducting and recording groups. That infrastructure was provided by the growing use of specialist focus group facilities with their one-way mirrors, client-viewing rooms, and video-recording equipment and which offered a performative space for moderators to display their skills. (On 'white room' settings, see Lezaun 2007.) It should be apparent that one gap in the story of focus groups is when and how this infrastructure first developed. The necessity for a 'fieldwork of the office' (Lee 2004) was hardly new. Early technological constraints on sound recording meant that, until the advent of magnetic recording, potential respondents commonly had to be brought to a facility where the interview could be conducted by stenographic or phonographic means. Interviewing in groups, however, created additional infrastructural demands, as well as opportunities for economies of scale.

scientists as a whole, the method was at least somewhat familiar to researchers in demography and the field of public health.

A number of large-scale projects dealing with family planning in developing countries had used focus groups as a data collection method in the late 1970s (Folch-Lyon et al. 1981; Suyono et al. 1981). Here, the borrowing from the world of marketing was less adventitious than was the case for Morgan and Spanish. Applied research on population issues in developing countries drew together national governments, private sector research firms, international non-governmental organisations, and academic researchers. Because of their funding and educational roles non-governmental organisations in the field had a high degree of involvement with what had become known as ‘social marketing’ (Schearer 1981). Although various definitions have been proposed (Andreasen 2003), the term ‘social marketing’ refers to “a program-planning process that applies commercial marketing concepts and techniques to promote voluntary behavior change” (Grier and Bryant 2005). Social marketing emerged in the late 1960s with the argument that the skills and methods associated with consumer research could be turned to promoting socially useful ends rather than simply selling commercial products (Kotler and Levy 1969; Kotler and Zaltman 1971). The techniques associated with social marketing lent themselves rather readily to the evaluation of health promotion and health education materials, and were used in that way by a number of US federal agencies in the 1960s. This work was quite familiar to population control advocates (Schearer 1981).

Even taking these factors into account, it is possible that demographers might anyway have been relatively receptive to focus group methods. Population studies is a field in which the mixing of quantitative and qualitative methods is common, since both the meanings surrounding family planning and reliable estimates of fertility behaviour are important. It is also a field where the focused interviewing of individuals was not unknown (Stycos 1955). However, while focus group methodology would probably have diffused out of demography eventually, such diffusion might have been slow. Particularly within the field of family planning, demography journals tend to be cited within sociology in specialist substantively-based journals (see Van Dalen and Henkens 1999), perhaps restricting their visibility.

Conclusion

As a scholar, Merton was acutely aware of his own practices and foibles. In consequence, ideas were, for him, often ‘self-exemplifying’ in the sense of providing their own example. For instance, Merton’s fascination with serendipitous discovery in science came about when he unexpectedly stumbled upon the word ‘serendipity’ and its meaning in a copy of the *Oxford English Dictionary* he had himself acquired serendipitously (2004, 233–8). In relation to obliteration by incorporation, Merton generalised from his own practice. He commented, for example, that “since, in all innocence, many of us tend to attribute a significant idea, method, or formulation to the author who introduced us to it, the equally innocent transmitter sometimes becomes identified as the originator” (1979, 564). Clearly, though, this hardly

exhausts the possible range of processes involved. Wineburg and Shulman (1990) discussing the reception of Merton's concept of the 'self-fulfilling prophecy' (1948) point to two additional situations in which obliteration is likely to occur. One is where a concept is transmitted across disciplinary boundaries by someone more associated with the receiving rather than the originating discipline. As they point out, educational psychologists tend to identify the concept of 'self-fulfilling prophecy' not with Merton but with the psychologist Robert Rosenthal, who developed an extensive programme of research on expectancy effects. One might see a parallel here with the role played by George Horsely Smith in popularising the notion of focused group interviewing in marketing research. Wineburg and Shulman also suggest that where a concept is compatible with more than one theoretical tradition, as the notion of self-fulfilling prophecy was with both neo-Marxism and expectancy theory, the process of obliteration by incorporation is likely to be 'amplified' (1990, 279), as identifying a particular originator for the concept becomes more difficult. The existence of group interviewing methods derived from clinical psychology probably helped to blur Merton's role in the origination of focus group methods. Obliteration of this kind might also be more likely to occur in relation to research methods where, as Platt (1996, 110–1) points out, there is a degree of 'relative autonomy' between underlying theoretical positions and methodological practice.

It might be possible to suggest that there were additional aspects of the work on focused interviewing that might, if only inadvertently, have obscured the method's provenance. As mentioned earlier, *The Focused Interview* was a codification. It took the 'procedural heuristics' (Lee 2008a) of the unstructured interview, commonplace strategies that interviewers use to manage the interview and the flow of elicited materials within it, and tied them to a wider, and theorised, understanding of what the interview was for and how its success might be judged. Although it drew on both sources, Merton et al's account of the interview was more comprehensive than that provided by Rogers (1945) and less convoluted than the work on interviewing that came out of the Hawthorne studies (Roethlisberger and Dickson 1939). In addition, it eschewed the therapeutic intent, manifest or latent, behind both of these earlier works. Merton and Zuckerman (1973) link the extent to which scholars in a particular scientific field are visible to the degree of codification within that field. Although their discussion is couched very broadly in terms of disciplines and age-cohorts, there is a hint here that obliteration by incorporation might actually arise as an unintended consequence of codification. One might conjecture that, intertwining principle and practice as it did, the ideas propounded within *The Focused Interview*, were set out with both a level of generality and practical versimilitude that might have made them readily assimilable within the field as a whole.

Although he was writing about 'classical' social theory, Charles Camic's comment on the utility of historical understanding of past work is apposite. Its value, he writes (1997, 6),

... lies not in turning up 'usable bits of lore' that may fit with our particular projects of the moment, but in providing a larger critical distance which frees us from the immediate present, exposes us to voices that do more than duplicate our own, and enlarges the horizon of theoretical alternatives beyond the finite bounds of current possibilities.

In this light, the intellectual and historical continuities and discontinuities between focused interviewing and focus groups prompt a number of observations. The contrast Lezaun (2007) highlights between the contemporary role of the focus group moderator and the focused interviewer is a reminder that the social relations of data collection shift over time. The emphasis Merton et al place in *The Focused Interview* on the Rogerian concept of ‘nondirection’ (Rogers 1945) probably reflects a degree of sensitivity towards what were at the time they were developing the method quite marked disparities in socio-economic status and educational attainment between interviewer and interviewee. In the wartime context, too, there were seemingly sensitivities around the position of researchers vis-à-vis enlisted personnel (Clausen 1984). In the more affluent and consumption-oriented post-war world the need for this kind of ‘institutionalised social diffidence’ was, presumably, much less clearly felt.

The story recounted here also has some relevance to debates about the ethical implications of methodological choices. There has been a tendency in accounts of the development of post-war American social science to see something of an elective affinity between quantitative methods and the interests of the state and/or capitalism. (For a summary, see Platt 1996, Chapter 5.) The extent to which the tobacco companies, among others, embraced qualitative methods, such as focus groups, has received much less sociological scrutiny. Although, for example, a writer like Vance Packard (1957) could develop a sustained and widely-read critique of the manipulative potential of marketing research techniques, sociologists preferred to dismiss him as a populariser (Horowitz 1994, 185). So, too, social marketers in their attempt to turn consumer research towards socially useful ends might have been more visible to sociologists than other segments of the marketing industry. Whatever the reasons for sociological disinterest, the early history of focus groups makes assumptions about the *intrinsic* ethicality or political purity of particular methods difficult to sustain.

Merton’s reputation as a structural functionalist has sometimes obscured his relationship to the Chicago tradition. Because the definition of the situation was central to Merton’s interest in the unanticipated consequences of action, he was intellectually open to theorists such as Cooley, Mead and Thomas. (It might be not without coincidence that Merton was friendly with William Isaac Thomas and his wife Dorothy. W. I. Thomas had moved to New York after his dismissal from Chicago.) Merton was also open to participant observation as a method (see, e.g., Merton 1968, 278). However, Cullen and Messner (2007) point to an important difference in sensibility between Merton and sociologists of the Chicago School. While the Chicagoans, with their religious and reformist roots, saw local areas as socially disorganised, Merton, who had grown up in an impoverished area of Philadelphia, had a rather benign view of immigrant and working class communities. This might have rendered less than methodologically compelling, from Merton’s point of view, the need for ethnographic understanding based on progressive engagement by an outsider. One might couple to this a perspective on interviewing within the qualitative tradition itself that was less straightforward than one might think. To some extent, the Chicagoans deprecated the interview as a method (Lee 2004). Early on, the interview was seen as being inferior to the life history and to ‘undesigned’ materials—what nowadays would be seen as unobtrusive data sources

(Webb et al. 1966; Lee 2000)—or was regarded as the province of social workers. Later the interview came to be regarded as a method to be used less on its own than in combination with other methods such as participant observation²¹. This, together with a tendency for qualitative researchers to learn their craft in apprentice-like relations with a more experienced mentor, might have encouraged disinterest in Merton et al's work or fuelled a tendency to draw only on its more practical aspects.

Merton, as Cole and Zuckerman put it, “has shown an almost obsessive fascination with scientific paternity” (1975, 140). He listed, for example, the many figures proclaimed by their descendants to be the “father of” this or that discipline and catalogued the frequently bitter priority disputes between scientific luminaries such as Newton and Hooke, Laplace and Gauss, and Janet and Freud (Merton 1957). One can read Merton's 1987 article as asserting in an urbane but nevertheless firm way his own priority to the development of the focus group. Certainly that claim is a sound one. It is likely, therefore, that Merton would have appreciated the title of his *New York Times* obituary (Kaufman 2003). It refers to him, quite appropriately, not just as a “versatile sociologist” but as “Father of the Focus Group.”

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²¹ Kleinman et al. (1994) point to situations where qualitative researchers have come to feel that their social identity as an ethnographer was compromised or diminished by conducting fieldwork based only on interviewing. To some extent, of course, focus groups might assuage this concern by seeming to provide a less individuated component to solely interview-based work.

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