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**Paul Atkinson** is Distinguished Research Professor of Sociology at Cardiff University, where he is also Associate Director of the ESRC Centre for Economic and Social Aspects of Genomics. His research interests include the sociology of biomedical knowledge, ethnographic research methods, and the anthropology of opera. Recent books include: *Everyday Arias: An Operatic Ethnography*, and *Contours of Culture* (with Sara Delamont and William Housley). The third edition of Martyn Hammersley and Paul Atkinson *Ethnography: Principles in Practice* was published in 2007.

**Sara Delamont** is Reader in Sociology at Cardiff University. Her research interests include the sociology of education – especially classroom interaction, school ethnography, higher education and gender; the sociology of the professions, including science. She is currently working on *capoeira* and its embodied habitus. She is joint editor of *Teaching and Teacher Education* and, with Paul Atkinson, is founding editor of *Qualitative Research*. Her recent books include *Feminist Sociology*. 
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SAGE QUALITATIVE RESEARCH METHODS

VOLUME I

Edited by

Paul Atkinson and Sara Delamont
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Contents

Appendix of Sources xi
Editors’ Introduction xxiii
  Paul Atkinson and Sara Delamont

Volume I

1. A Stranger at the Gate: Reflections on the Chicago School of Sociology
   Nels Anderson 1
2. The Past and the Future of Ethnography
   Patricia A. Adler and Peter Adler 9
3. Ethnography: Post, Past, and Present
   Paul Atkinson, Amanda Coffey and Sara Delamont 23
4. The Interactional Study of Organizations: A Critique and Reformulation
   Robert Dingwall and Phil M. Strong 33
5. Comparative Methods in Social Science
   Nigel Fielding and Jane Fielding 53
6. Towards a Peopled Ethnography: Developing Theory from Group Life
   Gary Alan Fine 73
7. Beyond Groups: Seven Pillars of Peopled Ethnography in Organizations and Communities
   Japonica Brown-Saracino, Jessica Thurk and Gary Alan Fine 91
8. Participant Observation in the Era of “Ethnography”
   Herbert J. Gans 113
9. On Fieldwork
   Erving Goffman 121
10. Erving Goffman’s Sociological Legacies
    John Lofland 129
11. Field Reality: Orientations
    Jaber Gabrium 153
Contents

   Peter M. Magolda
13. Exchange and Access in Field Work 195
   Paul S. Gray
14. From How to Why: On Luminous Description and Causal Inference in Ethnography (Part 1) 213
   Jack Katz
15. From How to Why: On Luminous Description and Causal Inference in Ethnography (Part 2) 243
   Jack Katz
   Lyn H. Lofland
17. Toward a Critical Ethnography: A Reexamination of the Chicago Legacy 295
   Jim Thomas
18. Everett C. Hughes and the Development of Fieldwork in Sociology 307
   Jean-Michel Chapoulie
   (Translated by Michal M. McCall)
19. A Meta-Ethnographic Approach and The Freeman Refutation of Mead 337
   George Noblit and R. Dwight Hare

Volume II

20. Stability and Flexibility Stability and Flexibility: Maintaining Relations within Organized and Unorganized Groups 1
   Patricia Adler and Peter Adler
21. Ethnographic Evidence 11
   Michael H. Agar
   Carl P. Florez and George L. Kelling
23. Four Ways to Improve the Craft of Fieldwork 41
   Robert M. Emerson
   Jean E. Jackson
25. Images of Recovery: A Photo-Elicitation Study on the Hospital Ward 87
   Alan Radley and Diane Taylor
26. Educational Ethnography as Performance Art: Towards a Sensuous Feeling and Knowing 115
   Carl Bagley
<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Author(s)</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>27</td>
<td>Discipline and the Material Form of Images: An Analysis of Scientific Visibility</td>
<td>Michael Lynch</td>
<td>137</td>
</tr>
<tr>
<td>28</td>
<td>Understanding Urban Life: The Chicago Legacy</td>
<td>Lyn H. Lofland</td>
<td>161</td>
</tr>
<tr>
<td>29</td>
<td>Street Phenomenology: The Go-Along as Ethnographic Research Tool</td>
<td>Margarethe Kusenbach</td>
<td>177</td>
</tr>
<tr>
<td>30</td>
<td>“Just Another Native?” Soundscapes, Chorasters, and Borderlands in Edmonton, Alberta, Canada</td>
<td>Brett D. Lashua</td>
<td>205</td>
</tr>
<tr>
<td>31</td>
<td>Doing Research in Cyberspace</td>
<td>David Jacobson</td>
<td>225</td>
</tr>
<tr>
<td>32</td>
<td>How I Learned What a Crock Was</td>
<td>Howard S. Becker</td>
<td>245</td>
</tr>
<tr>
<td>33</td>
<td>Ten Lies of Ethnography: Moral Dilemmas of Field Research</td>
<td>Gary Alan Fine</td>
<td>251</td>
</tr>
<tr>
<td>34</td>
<td>Problems in the Field: Participant Observation and the Assumption of Neutrality</td>
<td>Jeffrey H. Cohen</td>
<td>273</td>
</tr>
<tr>
<td>35</td>
<td>Collecting Data from Elites and Ultra Elites: Telephone and Face-to-Face Interviews with Macroeconomists</td>
<td>Neil Stephens</td>
<td>291</td>
</tr>
<tr>
<td>36</td>
<td>The Ubiquity of Ambiguity in Research Interviewing: An Exemplar</td>
<td>Cynthia Cannon Poindexter</td>
<td>307</td>
</tr>
<tr>
<td>37</td>
<td>Referencing as Persuasion</td>
<td>G. Nigel Gilbert</td>
<td>331</td>
</tr>
<tr>
<td>38</td>
<td>Contradictions of Feminist Methodology</td>
<td>Sherry Gorelick</td>
<td>343</td>
</tr>
</tbody>
</table>

**Volume III**

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Author(s)</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>40</td>
<td>Notes on the Nature and Development of General Theories</td>
<td>Anselm Strauss</td>
<td>1</td>
</tr>
<tr>
<td>41</td>
<td>Grounded Theory Method: Philosophical Perspectives, Paradigm of Inquiry, and Postmodernism</td>
<td>Merilyn Annells</td>
<td>13</td>
</tr>
</tbody>
</table>
42. Analytic Ordering for Theoretical Purposes
   Juliet Corbin and Anselm Strauss

43. Rediscovering Glaser
   Kath M. Melia

44. Grounded Theory: Evolving Methods
   Linda C. Robrecht

45. Premises, Principles, and Practices in Qualitative Research: Revisiting the Foundations
   Kathy Charmaz

46. Two Cases of Ethnography: Grounded Theory and the Extended Case Method
   Iddo Tavory and Stefan Timmermans

47. Five Misunderstandings About Case-Study Research
   Bent Flyvbjerg

48. The Personal Is Political
   Sherryl Kleinman

49. Qualitative Data Analysis: Technologies and Representations
   Amanda Coffey, Beverley Holbrook and Paul Atkinson

50. Qualitative Data Analysis: Representations of a Technology – A Comment on Coffey, Holbrook and Atkinson
   Raymond M. Lee and Nigel Fielding

51. The Art (Fulness) of Open-Ended Interviewing: Some Considerations on Analysing Interviews
   Timothy John Rapley

52. Doing Narrative Analysis
   Catherine Riessman

53. Narrative Turn or Blind Alley?
   Paul Atkinson

   Catherine Kohler Riessman and Lee Quinney

55. Writing an Intellectual History of Scientific Development: The Use of Discovery Accounts
   S.W. Woolgar

56. Beyond the "Fetishism of Words": Considerations on the Use of the Interview to Gather Chronic Illness Narratives
   Nathan Miczo

57. 'When Discourse Is Torn from Reality': Bakhtin and the Principle of Chronotopicity
   Stuart Allan

58. Having and Being Had By, "Experience": Or, "Experience" in the Social Sciences after the Discursive/Poststructuralist Turn
   Bronwyn Davies and Cristyn Davies
Contents ix

59. Immersion vs. Analytic Ideals and Appendix 351
   Sherryl Kleinman and Martha Copp

60. (No) Trial (but) Tribulations: When Courts and
    Ethnography Conflict 365
   Rik Scarce

Volume IV

61. Which Side Was Becker On? Questioning Political and
    Epistemological Radicalism 1
   Martyn Hammersley

62. Handing IRB an Unloaded Gun 23
   Carol Rambo

63. Ethics and the Practice of Qualitative Research 39
   Ian Shaw

64. “Becoming Participant”: Problematizing ‘Informed Consent’ in
    Participatory Research with Young People in Care 55
   Emma Renold, Sally Holland, Nicola J. Ross and Alexandra Hillman

65. Researching Researchers: Lessons for Research Ethics 75
   Rose Wiles, Vikki Charles, Graham Crow and Sue Heath

66. Reembodying Qualitative Inquiry 93
   Margarete Sandelowski

67. Gender, Disembodiment and Vocation: Exploring the Unmentionables
    of British Academic Life 107
   David Mills and Mette Louise Berg

68. Ethnographying Public Memory: The Commemorative Genre for
    the Victims of Terrorism in Italy 131
   Anna Lisa Tota

69. Unsettling Engagements: On the Ends of Rapport in
    Critical Ethnography 161
   Charles Fruehling Springwood and C. Richard King

70. Data Presentation and The Audience: Responses, Ethics, and Effects 177
    Carol A.B. Warren

71. Can We Re-Use Qualitative Data Via Secondary Analysis?
    Notes on Some Terminological and Substantive Issues 199
    Martyn Hammersley

72. ‘(Re)Using Qualitative Data? 213
    Niamh Moore

73. Whose Cornerville Is It, Anyway? 233
    Norman Denzin

74. Trash on the Corner: Ethics and Technography 243
    Laurel Richardson
Contents

75. The Gold Coast and The Slum Revisited: Paradoxes in Replication Research and the Study of Social Change
   Albert Hunter 257

76. Sociological Theory: Methods of Writing Patriarchy
   Dorothy E. Smith 269

77. Analytic Autoethnography
   Leon Anderson 297

78. Comments on Setting Criteria for Experimental Writing
   Patricia Ticineto Clough 319

79. Knowing your Place: Gender and Reflexivity in Two Ethnographies
   Fiona Gill and Catherine Maclean 333

80. Storying Schools: Issues around Attempts to Create a Sense of Feel and Place in Narrative Research Writing
   Pat Sikes 351

81. Feminist Ethnography: Storytelling that Makes a Difference
   Patricia McNamara 367

82. Quality Issues in Qualitative Inquiry
   Clive Seale 385

83. Emerging Criteria for Quality in Qualitative and Interpretive Research
   Yvonna S. Lincoln 399

84. New Methods, Old Problems: A Sceptical View of Innovation in Qualitative Research
   Max Travers 415
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<td>G. Nigel Gilbert</td>
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Appendix of Sources

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Authors need publishers. Academics must publish. They are required to do so for several reasons, and they partly mirror the interests of publishers. Clearly, academics need academic journals because the peer-reviewed academic journal paper is, in many quarters, the gold standard of scholarly and scientific publishing. Hence, publishers and authors need journal editors, journal editorial boards and panels of referees to sustain the moral economy of the journals, in which credit and legitimacy circulate, and where standards
of quality are maintained, by academics working altruistically. Academics also need to publish monographs, which are the definitive academic outputs in many disciplines, such as social anthropology or history where an individual's academic identity is largely defined by his or her standing as a book author.

The publication of journal papers and research-based monographs is among the key aspirations of academics. Publishers and authors can both reap the rewards of prestige from such publications. But, as we have already suggested, they are not the only kind of undertaking from which publishers and authors benefit. At the opposite end of the spectrum from a research monograph is the introductory textbook. Equally, there are more advanced textbooks that can occupy a hybrid, intermediate position between 'journal science' and 'textbook science'; these types are derived from the early work on science by Ludwik Fleck (1979). While 'textbooks' of various sorts may not have the same academic cachet as the purely research-based work, they can be hugely influential in a field, and can reach much wider audiences than the more esoteric work of research scholarship. The markets that books might be expected to reach speak for themselves. An introductory textbook can, in principle, reach tens of thousands of students, and the social sciences have a number of famous examples. An advanced textbook can still sell thousands of copies, reaching a large number of graduate students, as well as their mentors. There are, in other words, various ways in which academic authors and publishers share interests, and where esteem, monetary gain and career advancement are enhanced on both sides.

Successful publishing means more than just that, however. The kinds of relationships fostered by publishers, journals and authors can make real differences to the direction of academic disciplines. If a journal is created in a particular specialist domain, it can provide the intellectual space in which that emergent field can flourish. New journals develop hand-in-hand with the disciplines and specialist sub-disciplines that they publish. Modern social research – in common with all academic work – has been marked by the proliferation of journals devoted to newly developed specialisms. The establishment of such journals and the papers published in them help to validate new academic domains and intellectual movements.

Likewise, the establishment of book series can serve a similar function. Under the general editorship of one scholar or a small group of specialists promoting a new direction, a new substantive field, and so on, a book series can provide an intellectual space in which original scholarship in that innovative domain is made visible, and is given shape by its inclusion in the book series itself. Books such as Methuen's 'New Accents' series, under the general editorship of Terry Hawkes, for instance helped to define a whole generation of literary criticism, informed by structuralism, post-structuralism and other theoretical movements. Key textbooks can also help to define a
field, to mark new departures and to help establish new reputations. So too can edited collections of innovative essays (sometimes promoting an emergent grouping, or school of thought). The social sciences are full of examples of such defining volumes and such defining moments.

While it would be easy to think of publishers as merely passive vessels for the academic work they promote, they are not simply responsive to the work of the academic communities they work with and to whom they sell books and subscriptions. Successful publishing means being proactive. Good commissioning editors are alert to emerging trends and to rising ‘stars’ in the academic world. They work quite decisively to help shape a discipline. In an ideal world for both sides, there would be a virtuous circle between publishers' and scholars' interests. New ideas are taken up by publishers, while they simultaneously help to define an academic field and a market for their books and journals.

This is not characterised by a constant search for novelty on the part of publishers, however. No publisher really wants to be the first in the field. Would-be authors soon learn that assuring a publisher that a proposed book is unique and entirely novel is a sure-fire way of ensuring a rejection letter. Publishers – like any commercial actors – like to spot a trend and then to amplify it by establishing a distinctive position in a new and expanding market.

Throughout these processes – of shared interests and self-interest – academics and publishers are all concerned with issues of quality. Journals that publish sub-standard work do not flourish: subscriptions are not renewed. Monographs have to establish some sort of reputation for themselves, not least through the process of published reviews in the scholarly journals (not to be confused with peer-review ahead of publication, which also takes place). If textbooks are meretricious, they will not stand the test of time; they will not be recommended to students; they will not sell in university bookshops or through the online companies that are replacing bookshelves. So academic quality and commercial interests also go hand-in-hand. Unfortunately, this does not mean that everything that gets published is equally good: there is an element of Darwinian competition between titles, between authors and between publishers.

Competition and pressures on quality are increased when there are periods of economic restraint. Journals are dependent on institutional subscriptions (increasingly bundles of rights to electronic access as well as the printed copies on library shelves). Sales of textbooks are also dependent on libraries' and students' budgets. Academic and commercial interests in publishing therefore converge once again, in trying to identify and maintain niche positions, while ensuring outputs of high quality. Despite repeated jeremiads about the demise of the academic journal and the death of the book, some publishers continue to occupy significant positions in the market and to produce materials of high value.

It is against this general background that we can understand the distinctive
contribution made by SAGE to the publication and promotion of research methods in the social sciences. Research methods publishing and SAGE itself have expanded pari passu over the past forty-five years. It is undeniable that SAGE has contributed to the research methods literature in a way that is, if not unique, then certainly pre-eminent. They have helped, to a very considerable extent, to shape the academic work on research methods and on methodology in the social sciences. This has been one very clear instance where the general climate of scholarship, academics’ intellectual interests, teaching needs and student demand, and the commercial interests of a publisher have coincided. The result has been an explosion of published work, academic and publishing careers founded on that work, and the expansion of SAGE itself as a publishing house.

Since 1970 or thereabouts, SAGE has succeeded in positioning itself as a (perhaps the) leading publisher of research methods in the English-speaking world. Of course, to those unacquainted with the relevant literature and the current scene in the social sciences themselves, the above assertion may seem trivial. So what? Of what consequence is it that SAGE, or indeed any publisher, should establish a major reputation and a major market share in social research methods?

The answer is that research methods themselves have become hugely significant in the social and cultural disciplines. There has been an exponential growth in the teaching of research methods, at undergraduate and postgraduate levels, in all the major countries where those disciplines are represented. The expansion in ‘methods’ as a kind of specialism in its own right has been remarkable. There are several reasons and their respective contributions have been different in different national contexts, although the trends have converged to create a global discourse of methodological expertise and pedagogy. These changes represent a huge sea-change in the collective perception of social research and training at undergraduate and postgraduate levels.

In the United Kingdom a major driver has been a progressive transformation in postgraduate research training. The change has been promoted by the Economic and Social Research Council (ESRC) who fund many of the postgraduate studentships (the vast majority of funded studentships in the social sciences, though not the majority of students) and who, therefore, exercise a strong influence over the shape and content of postgraduate training itself. The ESRC has promoted an emphasis on formal training as an essential component of postgraduate work (Delamont, Atkinson and Parry, 2000). When they first introduced their policy in 1985/86, the training in methods was grafted into the standard British three-year doctoral programme. In more recent years, the ESRC has moved to a ‘1+3’ system of funding, whereby doctoral candidates complete a one-year Masters in research methods, followed by three years of independent, supervised research
supplemented by further career development and advanced training activities. There is, moreover, a sustained discourse of ‘capacity building’ in UK social science. This places considerable emphasis on the enhancement of research skills for scholars at all levels throughout the UK academic community, through various forms of training and interventions. The wisdom and effectiveness of these programmes are not our concern here. Rather, we draw attention to them as just one significant impetus towards a pervasive discourse of methodology. The provision of basic and advanced methods training is a significant undertaking for all research-led university departments in the UK. Careers are increasingly open to scholars with a substantial interest in methodology of all stripes.

It would be wrong to attribute the rise of interest in research methods publishing primarily to the UK context of higher-degree training. The latter is as much a symptom of various ‘methodological turns’ in the social sciences as it is a cause of any of them. The greatest impetus – as in so many things in the social sciences – derives from the United States, where methods training and methods publishing have become ‘big science’ and ‘big business’. In many ways, recent changes in UK higher education policy have led British provision towards a ‘mid-Atlantic’ model. American doctoral programmes have for long incorporated a requirement for methods training (as well as other Masters-level courses) for doctoral candidates. There has continued to be a major expansion in provision in the United States, with a concomitant rise in demand for textbooks.

The expansion of demand for research methods has been accelerated by the increase in social research in ‘applied’ areas. Sociology or anthropology alone would not support the increase in sociologically- or anthropologically-inspired methods. We must acknowledge the role played by the expansion – the colonisation perhaps – of fields like nursing and healthcare studies, of education, of business and organisation studies, of design and cultural studies, of fashion and fine arts by sociological and anthropological ideas. (There have, of course, been migrations of ideas in opposite directions.) More and more textbooks and sourcebooks of research methods aimed specifically at such markets have swelled the volume of academic publishing in social research. Not only have such fields increased the absolute number of students and researchers, they have also contributed to a wider desire for methodological expertise and advice.

Indeed, one can detect a widespread attitude towards the methodology of the social sciences, over and above the needs of particular research training programmes or the expansion of social research into relatively newer domains. The attitude towards research methods seems to have changed generically. In disciplines like sociology and anthropology, explicit attention to methodology per se has become more apparent among recent generations of researchers (although anthropology as a discipline resists the methodological
Editors’ Introduction

This is not to imply that earlier generations were cavalier or sloppy in the conduct of their research, but that methodological expertise or sophistication were not widely treated as major issues in their own right. Research was conducted in straightforward ways – single-handed ethnographic fieldwork, sample surveys, community studies – and with relatively little explicit attention to methodological issues, problems or specialisation (Atkinson, Coffey and Delamont, 2003).

The reasons for more explicit methodological sophistication and reflection are complex. They include a number of methodological critiques, crises and revolutions. (Or at least, alleged ‘crises’, ‘revolutions’ and the like). In sociology, one might be tempted to identify as one key turning-point Aaron Cicourel’s landmark book Method and Measurement in Sociology (1964), at one time the most widely used and widely cited book on methodology in the discipline. It was, at the very least, a symptom of a broader dissatisfaction with the then taken-for-granted methods of inquiry. In sociology, the intellectual shifts of the 1960s and 1970s, including the influence of constructivist, phenomeno-logical and ethnomethodological perspectives, helped to create an intellectual atmosphere in which theoretical and methodological diversity flourished and was celebrated.

These shifts also reflect greater methodological specialisation, sophistication and reliance on expert knowledge. The growing power and availability of computing has put bespoke software for data management and analysis literally at the fingertips of every researcher and every student. It is, after all, only a couple of generations since software like SPSS has been widely available and only in recent decades has software been developed for the management of qualitative, textual data (such as The Ethnograph or KWALITAN packages, and more latterly NVIVO and Atlas/ti). Multivariate statistics and modelling or complex textual management – these require a degree of specialisation and training beyond what was expected of social scientists in earlier periods, when they would have been the preserve of a few expert scholars.

This is not the place for a comprehensive review of the rise in ‘methods’ in the social sciences, and these volumes are devoted to only a part of that story. But it is important to recognise that, to a considerable extent, methodological writing and publishing is a relatively recent area of growth. And SAGE has played a prominent role in that process. In these four volumes we are, of course, concerned exclusively with ‘qualitative’ methods in the social sciences. And there can be absolutely no doubt that there has been an exponential growth in the publication of methodological texts and journal articles, and in journals defined primarily in terms of a methodological orientation. Indeed, one can argue that the very idea of a distinction between ‘qualitative’ and ‘quantitative’ is something of a modern invention, as a consequence of so much methodological writing. Research that is nowadays called ‘qualitative’ has a long history in sociology and anthropology.
forms of participant observation, life-history interviewing and documentary analysis are as old as the last century. But they were not pursued as ‘purist’ methodological exercises. The anthropologists of the classical era (Malinowski, his immediate successors and their students) made no great fetish of ‘method’. They certainly did not equate ethnographic fieldwork with a single methodologically-driven paradigm. They did not draw symbolic boundaries between qualitative and quantitative methods. Likewise, the urban sociologists, and their students, who worked at the University of Chicago worked in an environment where qualitative and quantitative studies were conducted simultaneously. While sociologists clearly worked in different ways, there do not seem to have been the same sorts of sectarian disputes as characterise the current scene. Methodological contestation between qualitative and quantitative researchers is a relatively modern invention. The contemporary champions of ‘mixed methods’ seem to offer, at best, an uneasy settlement; and there remains plenty of tension between the two interests, not least in the United States.

There is no doubt, however, concerning the impact of emergent qualitative regimes in social research across a wide range of disciplines. Where once such research was a minority interest, it is now a mainstream activity. While large-scale quantitative studies (such as randomised controlled trials) are still likely to be regarded as gold standard in many quarters, the significance and legitimacy of qualitative research has been acknowledged with increasing currency. Although there is no lack of jeremiads concerning the standing of qualitative research, the everyday realities of academic research and academic publishing tell a different story. Textbooks, handbooks, major reference collections and journals all find international audiences in considerable numbers. There is evidence of qualitative work being undertaken in a wide range of disciplinary fields in many national contexts. Qualitative research is a global success for practitioners, methodologists and publishers alike.

This expansion of qualitative research has been matched – outstripped even – by the explosion of methodological writing on qualitative methods. While qualitative research (by any other name) has a long history, qualitative methods as topics of reflection are more recent. For generations of graduate students and researchers, the research traditions were essentially oral in nature. Research skills were tacitly acquired through apprenticeship. They were treated as matters of intellectual craftsmanship.

In sociology there were several movements towards a more explicit, reflective codification of research methods. In the late 1960s and through the 1970s in the USA, members of the ‘Second Chicago School’ (Fine, 1995) – most notably Anselm Strauss and a number of co-authors – began producing explicitly methodological texts on fieldwork and papers (now regarded as classics of their kind) on various particular topics. By the 1990s and on into
the new century, the publication of methods texts and papers had grown exponentially.

Anthropology and ethnographic fieldwork implied one another most intimately. There was, in that sense, no need for a separate methodological domain in anthropology. Equally, there were very few purely methodological disputes within anthropology. What has elsewhere become called ‘qualitative’ research, in anthropology was always just ‘ethnography’ or ‘fieldwork’ and was the taken-for-granted research strategy. While sociologists sometimes included anthropology in their sources of inspiration, anthropologists paid singularly little attention to the methodological developments in sociology and other disciplines. In more recent years, however, anthropologists have become somewhat more self-conscious in their own methodological writing, and have become especially sensitive to matters of writing and representation, in a series of interventions prompted by the innovative collection of papers edited by Clifford and Marcus (1986). Since SAGE has done relatively little in the field of anthropology, and anthropologists have paid relatively little attention to methods, neither has impinged a great deal on the other. (The SAGE journal *Field Methods* is addressed to anthropologists, so this generalisation has to be tempered somewhat.) The same is not true elsewhere.

The rise in methodological publishing can be attributed to the expansion of empirical research and methodological reflection in a broad range of disciplines and specialised fields of inquiry. The rise of qualitative research is reflected in a number of indicators. There are journals whose subject-matter is defined in terms of a methodological perspective as well as a substantive domain, such as *Qualitative Social Work* (SAGE), *Qualitative Health Research* (SAGE) or *International Journal of Qualitative Studies in Education* (Taylor and Francis). Some journals are defined in terms of methods alone, such as *Qualitative Research* (SAGE), *Ethnography* (SAGE) or *Field Methods* (SAGE). These are exclusively devoted to field research of various sorts. There are other journals of methods that are not devoted specifically to qualitative work. In the world of methods publishing the influence of the internet has been especially important. There are several online journals that are major outlets for methodological papers. For example, *The Forum for Qualitative Research*, is a major outlet, principally for European research.

Much of this can be attributed to the publishing activities of SAGE, and to some key figures in that publishing house. SAGE has made a unique contribution to the promotion of qualitative research and qualitative methods. Few publishing houses could have played such a role in shaping and promoting such distinctive features of a series of academic disciplines. Through their proactive publishing strategies they have created markets for methods texts of all sorts, and qualitative methods have been prominent.

In introducing these four volumes that represent ‘the best of SAGE’, therefore, we retrace and celebrate the SAGE contribution to methodological
Editors’ Introduction

Advance, debate and reflection. It cannot be, and is not intended to be, a comprehensive review of everything published in the field since SAGE’s earliest days as a publishing house. For obvious reasons, we do not reproduce chunks of well-established textbooks. Equally, there are many edited collections, including numerous handbooks, that provide surveys of particular fields in their own right. We do not seek to replicate them here. Our emphasis has been primarily on papers and similar publications. We explain our approach to selecting and linking papers later in this introductory chapter.

At this point it is worth noting some of the distinctive highlights and benchmarks in the SAGE trajectory of methods publishing. One of the most significant publishing ventures that simultaneously helped to promote methodological expertise and to stake SAGE’s claim to the market was the establishment of two series of short texts: the first in quantitative methods, the second in qualitative. The quantitative methods series is widely known by its distinctive format and design (‘the little green books’). It covers a very wide range of quantitative, statistical techniques, and currently runs to more than 160 titles. It was followed by a parallel, though smaller, series on a broad spectrum of topics in qualitative research (‘the little blue books’). The two series were different, not merely in terms of the colour of the covers. Whereas the quantitative series dealt primarily with technical issues, the qualitative series tended to deal with rather more generic issues of research strategy and practice. They – like their quantitative counterparts – helped to frame the growing volume of research interests, and furnished the research community with a number of key points of reference. We have, therefore, felt free to excavate some extracts from those short monographs (they were about 20,000 words in length) because, as we have said already, they help to document the intellectual history of the genre and some milestone publications from SAGE itself. There are over 50 titles in the series.

We have already made reference to the emergence of methods publishing and methods teaching in the social sciences. But one cannot overstate the significance of an emergent field of methodological publishing that witnessed extraordinary growth. It is tempting to see this as merely the expression of an increasingly technical approach to the social sciences, where the more established ‘disciplines’ become transfigured into a generic ‘social research’, where method substitutes for and prevails over social theory as the defining characteristic, and where research techniques have greater significance than research ideas. There is, indeed, some truth in that. It is clear that ‘methodology’ has almost become a specialism in its own right, and epistemological commentary can treat methods as if they were ‘paradigms’ in their own right. In ways we expand on later in our introductory essay, this style of thought has become especially visible in the context of ‘qualitative research’.

This can be seen, by way of example, in the strange fate of ‘grounded theory’, and we elaborate on that case here because it illustrates our general