

RESEARCHING SOCIAL MOVEMENTS: METHODOLOGICAL CHOICE

GAYANE HARUTYUNYAN*

Abstract

In the second half of the 19th century, the world was confronted with large-scale social movements, which changed the relations between the citizen and the state once and for all. Particularly, the emergence of the Suffragette movement, then Vietnam's anti-war movement, as well as the influence of many other smaller, local, short-term social movements, raised new questions for the scientific community. How to study social movements? Which method is more convenient and how to apply it? What kind of knowledge can be developed by studying social movements, how can society benefit from that knowledge? There are many answers to these questions, which are contradictory even today.

This article is an attempt to present the features of the main sociological methods of studying social movements, which play a key role in the exploration of the phenomenon. The article discusses the peculiarities of such research methods as observation, case study, grounded theory, survey and analysis of documents from the perspective of studying social movements.

Keywords: social movement, methodology, method, observation, case study, grounded theory, document analysis, survey, triangulation

Introduction

The socio-economic and political processes typical for the second half of the 19th century, as well as structural changes in Western societies stimulated the formation of the scientists' interest toward social movement research. The latter stemmed from a practical need to understand how social change takes place. Researchers' interest in social movements has grown in recent decades (Rucht, Neidhardt, 2002: 8). The democratization of societies and the liberalization of political regimes have created solid ground for the emergence of new social movements, which have not only become widespread, but also, over time, in parallel with the technological development of societies, have acquired new features. In the 21st century, social movements have moved away from traditional movements, which emerged as a means of fighting for an economic value (Schulz, 2016: 3). The "New" social movements found in the literature, the study of which began in the 1960s, as a social mechanism for improving the quality of life, are now undergoing a transformation too. The development of alternative media

* Gayane Harutyunyan works at National Center of Educational Technologies, sociologist.

Email: gayane.harutyunyan@gmail.com

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and access to the Internet are breaking down the boundaries of time and space, transforming social movements, creating a new era of struggle (Wolfson, 2012: 150). In this new age, access to information is changing the power relations that build public institutions, as are the ways in which those power structures are resisted (Castells, 2012: 18). The latter are transferred from a real life to an online platform, where the mobilization of the social movement is faster, more targeted, and it is almost impossible to stop it. Due to this fact, social movements once more gained the attention of researchers. Thus, the research on social movements went beyond mere sociology; it began to be viewed as an object of study for political science, ethnography, history, and other disciplines. Due to this circumstance, there is a necessity to develop not only theoretical approaches that will explain the causes of social movements, reveal their nature, describe the types and stages of development, but also promote and empower the empirical study of social movements.

Despite the fact that there are many theoretical and empirical studies in the field of social movements, in recent years only a few major attempts have been made to summarize the methodologies for studying social movements (Della Porta, 2014: 4). Accordingly, the work is relevant because it will provide an opportunity to take a fresh look at modern methods of studying social movements, contributing to the development of empirical studies in this field, without which it is impossible to fully understand and interpret them. This article aims to present the most common sociological research methods and focus on how-to-do it, how to address their actual application, and how to deal with main challenges in the fieldwork. This article also, tries to describe not only process of data collection, obstacles and dilemmas which inevitably emerge in the social movement research fieldwork and data interpretation, but also suggests solutions for the tricky situations.

Methodological Diversity

The sociological study of social movements implies the application of different methodologies. The cumulated decades-old traditions of the scientific study of social movements have provided a rich theoretical basis. The use of methodologies based on both Positivist and Interpretive theories can be found in the existing literature on the study of social movements ((Della Porta, 2014: 5). Therefore, both deductive and inductive methods are used in the study of social movements. In this regard, it can be reassured that for the study of social movements, as in the case of many other social phenomena, it is impossible to single out one methodology or one method that can be considered as the best. In the study of social movements, all traditional sociological methods can be used, taking into the account some specific nuances of the application. Most often, given the peculiarities of social movements as a complex social phenomenon, researchers prefer to use the method of triangulation. The triangulation of methods allows not only to deepen, but also to verify gathered information. In other words, the study of social movements implies the choice of one or more methods, provided that the researcher must take into account the advantages and disadvantages of each method, the available resources, as well as the research question raised by the researcher.

The Art of Questioning

Any research starts with the main research question. This rule also applies to social movements research. In the context of social movement research, questions can be conventionally divided into descriptive and analytical types. Looking at the literature, we see that the studies of social movements are mostly descriptive. Researchers aim to describe the emergence of social movement, to reconstruct the chronology of events, to describe the mechanisms of member mobilization, and so on. In this case, researchers are interested in the "how" of the social movement. In some cases, researchers try to find the answer to the "why" question by trying to analyze the cause-and-effect of the events, uncover the underlying motivations for individuals' motivation, understand the role of the individual and group identity in the context of overall movement development, the obvious and hidden factors contributing to the success or failure of the movement, and etc.

Sociological theories, which allow the interpretation of the received data, help to raise analytical questions and analyze collected data. The theories chosen by the researcher are of great importance here, as different theories may have different explanatory powers. These two conventional approaches allow the researcher to develop a complete research design, defining the research goal and objectives, specifying the object and subject, choosing the appropriate methodology and the resulting method.

Briefly referring to the background to the application of social movement research methods, it should be noted that the latter developed in parallel with the theoretical concepts that interpreted them. Each theory of social movement interpretation brought a method or set of methods that were considered to be the most effective for studying social movements at a particular time.

Observation

The study of social movements arose in the context of behaviorism, the study of collective behavior, for which the primary method of observation was observation. It helped to understand how individuals or social groups respond to external stimuli. In addition, many researchers studying movements in the 1960s were involved in that movement, and therefore studied it "from within" using observational techniques. This fact contributed greatly to both the improvement of this method and the empirical study of social movements (Balsiger, Lambelet, 2014). This method can be very useful if the researcher aims to understand the motives, working style and strategy of the participants in the movement. It is a unique tool that can tell the researcher what culture the participants of the movement are from, what identity they share, how the movement grows, how it acquires allies, how the social conflict matures, and etc.

In the case of the study of social movements, the unstructured observation method is mainly used, which is typical for qualitative research. This method has many advantages, including:

- First-hand data collection
- Possibility to change the research point
- Attachment of cases and events to social context

- Transformation of the study of collective behavior from meso- and macro- level to the study of interactions between individuals at the micro level.

The limitations of this method include the high probability of influencing the observer's perception of subjectivity, the impact of general events on the perception of the phenomenon under study, and the possibility of modeling errors. Currently, observation as a method of studying social movements is rarely used due to the cost and time consumption. In addition, frequent usage of participant observation can also pose a physical hazard to the researcher, as the development of events is not always predictable whereas being an involved observer means participating in the life of the movement in all its manifestations. The application of observation in the study of social movements has the same approach as in the study of other phenomena, but it also has certain peculiarities:

- *Difficulty in defining the object of observation is a serious problem for the researcher* - the social movement, being a variable phenomenon is in a constant change. How to determine the boundary of movement, how to understand that the very properties of movement that are predetermined are being considered. To overcome this problem the researcher must choose one of tens of hundreds of definitions of social movement that can be considered and measured in social reality.

- *The task of clarifying the boundaries of the field* - one of the most important stages of research is the beginning of fieldwork, in other words, the collection of data on the basis of which the established hypotheses must be confirmed or refuted. But in the case of social movements, the so-called "field" is very blurred and situational. As a rule, it's difficult to fit social movements within a single common temporal-territorial boundary. In addition, social movements do not "operate" 24/7 and are not constantly accessible, as are other research sites. Demonstrations, such as protests, may not take place for months, and after a while, may take days or weeks. Given this fact, what is said in the field should be defined by the researcher based on the raised problems.

- *How to communicate with the participants of the social movement* - one of the key tasks of the study of the social movement is to find common ground with the participants. Social movement, consisting of heterogeneous groups, is not always accessible to the researcher, even in the case of a participant observer. Each individual group within the movement may have its own interests, lack of trust in other groups, may have a secret struggle for power and control of the movement, and so on. The researcher has no idea about these problems when starting the observation. It can often happen that by "getting closer" to one group, the researcher loses the opportunity "to get access" to study of other groups. To avoid such situations, it is necessary for the researcher to gain the trust of the group, especially when the observation is not participant one. The researcher must understand that the members of the social movement may be skeptical of his activities, suspect that he is a servant of the interests of the opposite camp, or simply intend to harm or hinder their activities and actions. That is why the researcher should follow the activities of the movement with the same diligence as the participants of the movement, maybe he should volunteer, take part in certain public actions. The trust gained in this manner will allow you to look at a more direct, consequently more accurate picture and make a real understanding there, rather than a staged image.

- *How to start and end the observation-* It is desirable to have a pre-designed plan that will prompt the researcher to record specific cases. This plan should be developed based on the researcher's questions. The researcher in the field has to make detailed and extensive notes every day, recording when the events happened and by whom. This will allow accurate restoring of the chronology of events in the future. It should be taken into account that the first days of observation are always the most difficult, because the researcher does not yet have an idea of what is happening around him, does not know what processes are taking place within the group, the group may not trust him yet, etc. It's obvious that the more time a researcher spends in the role of an observer, the better he / she understands the processes, the more sensitive information he / she is able to observe due to being accepted by the movement. The observer can use pictures, audio-video recordings as information as well. Data collection in this way might take a very long period depending on the research question and the life of the movement in general.

Case Study

The study of social movements with the help of the observation method helped the researchers to look at each movement as a separate case, to study the movements using the case study methodology itself. From this point, the majority of the social movements' studies, after all, are a study of a specific case in a specific period of time (Snow, Trom, 2002: 146).

Case study methodology allows identifying the development dynamics of the object under study, to understand it in its entirety, to understand group norms, values, social roles and expectations during the social movement operations. Thus, this methodology focuses on an in-depth, comprehensive, systematic study of one social movement as a separate case.

Studies of social movements carried out using the case study methodology have some peculiarities. First of all, the study of each case is a study of a subtype of a certain movement, the results of which cannot be extended to other types of movements. That is, when the "Occupy Wall Street" movement is studied as a case, the results cannot be extended to other American economic and political movements. This circumstance is often considered a methodological limitation. Studying a single case of movement, it is not possible to apply the obtained results to similar cases, therefore, it is not possible to make certain classifications. The next nuance is that the researcher again has to deal with definition issues: one of the most important questions is to define the boundaries of the case, where the social movement begins and ends. For the purpose of the related research, the researcher must select a relevant case as a typical object, if researcher wants to spread the results on similar cases, or a theoretical case, if researcher wants to test any theory, etc.

One of the peculiarities of this methodology and at the same time one of the advantages is that it allows receiving in-depth, comprehensive information about a single case. The method is quite flexible. Different methods can be used within it depending on the logic of the situation (Թ-սղևույսն, 2006: 162).

Another peculiarity of the study of social movements is that it allows us to understand social movement in its full context in terms of complex and mediated social relationships, space and time interconnections.

Grounded Theory

The widespread use of positivism and quantitative methods after the end of World War II gave rise to numerous criticisms of the case study methodology. The conflict between positivism and antipositivism, which in this context was also a clash of quantitative and qualitative methods, was partially shifted by the application of the grounded theory. The purpose of this methodology is to generalize a theory based on data collection. This methodology is not often used in the study of social movements as it aims to generate a middle range theory. In case the researcher does not intend to develop a formal or substantive theory as a result of field work the application of this methodology is not expedient, as the same field data can be obtained by methods used within other methodologies. One of the advantages of the grounded theory methodology is that its data collection and analysis are carried out in parallel. Such flexibility makes it possible to always follow the development of the research without missing any essential facts, that can help to interpret the ongoing process or phenomenon peculiarities. At the same time, this advantage can be seen as a disadvantage in the case of lack of time or human resources.

The process of data collection within the framework of grounded theory takes place mainly through the following methods: observation, focus groups, in-depth interviews, document analysis (Bruce, 2007: 56). In the study of social movements, researchers prefer to combine these methods. Their combination is important because each method allows studying social movements from a specific angle (Mattoni, 2016: 24). For example, to understand the individual motivation or life experiences the person experienced before or after joining the movement, to observe the power relations within the movement and to describe the culture, identity, language of the movement, narratives through which the movement is told to the public, etc.

The sampling used in the methodology of the grounded theory does not claim to be statistically significant, as the primary goal is not to identify general trends, but to identify information-rich informants who will assist in deciphering research topics. Therefore, the use of targeted sampling is considered effective enough. The latter can change both qualitatively and quantitatively during the research. In the case of social movements, the snowball method is more effective because the researcher cannot identify all the possible actors, and the participants in the movement are better informed and can give the right directions. The next important question that always torments the researcher is the question of sample size. When should the researcher realize that it is time to stop collecting information and move on to the next stage, data analysis? A sample is considered sufficient when new information from the field no longer alters the analytical categories selected by the researcher (Bryant, Charmaz, 2010: 21). Since in the case of sound theory, data collection, analysis, and category coding do not occur linearly but are repeated several times, this option allows receiving information-rich cases.

The peculiarities of the grounded theory in the study of social movements are conditioned by the analysis of data. It starts with the coding process of the data collected in the field, then data is grouped, conceptualized, and then reassembled into different groups. Coding is performed in three stages: open, axial and selective coding. Here the researcher's own views, ideas about the social movement and its peculiarities play the main role, because it is the researcher who has to abstract the data, create categories, define the causal relations, as a result of which the theory is being formed. In the case of the study of social movements, the greatest difficulty is faced in the coding stage. The social movement as a type of collective behavior, is in a constant change, conditioned by many different factors, that is why it is difficult not only to conceptualize, but also to define causal relations and undergo some sort of abstraction. Here the researcher should rely on existing theories, which can to some extent interpret the obtained data and outline some connections. The next difficulty is conditioned by the fact that the researcher, as a result of the coding process, can abstract the data to a certain level that it leads to a completely wrong direction and gets an interpretation of another reality. For this reason, it is desirable for the researcher to repeat the data collection-analysis chain several times.

Interview/Survey

Qualitative interview is one of the most common methods of studying social movements. Depending on the researcher's possible goals - to get an expert opinion, to form an idea about a certain event, to have a deep and comprehensive understanding of the social world of the movement participants, to understand what role the movement played in a person's life, why it was decided to support the movement, etc. - a certain type of interview can be considered - experts interview, oral story, in-depth interview, life story, etc. Qualitative interviewing can be used as a stand-alone method or as one of triangulation methods. Based on the set goal, the questionnaire is compiled, the groups of informants are selected, and then the data collection phase begins.

The advantage of interviews as a method of studying social movements is that it provides the opportunity to receive in-depth, comprehensive, quality information. The free style of the interviews - the informal nature - give this method an advantage, as they create a cooperative, relaxed environment for the interviewee, contributing to more sincere answers. One of the disadvantages of this method is the presence of subjectivism in the interpretation of data, the difficulty of generalizing the results obtained, as well as the timeliness.

Criticism of qualitative methods and their questioning in terms of scientific base, contributed to quantitative methods in the social sciences in general, as opposed to the superiority of qualitative methods. Numerous studies were conducted in the 1980s, the main method of which was surveying. This method continues to be frequently used today as a means of obtaining certain descriptive information, such as gender, age, employment, party affiliation, motives for joining the movement, and so on. This method allows deriving certain numerical patterns about the characteristics of the participants in the movement.

Quantitative surveys can also be used as a tool for public opinion research, through which it will be possible to understand how a particular social movement is perceived

by different social groups. In this case, the data collection tool is the questionnaire, the sample is constructed taking into account statistical representation. The advantage of the method is the possibility of providing statistical representation, as well as the generalization of the obtained data. On the other hand, this method does not make it possible to understand and identify the underlying motives for the actions of the members of the movement, in addition this method is one of the costliest.

The researches carried out by these two methods can be presented as separate researches. In addition, the researcher can use the information gathered by these methods to test the explanatory power of any theory in the case of a particular movement.

Document Analysis

Document analysis as a method of studying social movements is mainly used in combination with other methods, often in the context of critical discourse analysis. This method allows the researcher to understand what kind of reality is being generated and reproduced with the help of the language. This method allows exploring:

- What image of reality does the movement create? Who does it define as a "savior" or "enemy" ? What characteristics are given to these two?
- How does the ideology of the movement arise? What ideology the movement unites around? What goals does it set as a result?
- How is the symbolic field of movement shaped?
- How is the narrative of the movement formed, in what texts and through what language?

The application of this method begins with the definition of the document. The researcher must first decide what he or she considers a document. The latter can be materialized by any source of information on any medium: books, newspapers, blogs, vlogs, audio materials, posters from demonstrations, etc. Given the amount of information available on the Internet today, whether primarily in digital or audio form, this method is becoming an indispensable tool for studying social movements. On the other hand, this circumstance creates additional problems for the researcher. It becomes more urgent to understand who the authors of the documents are, for what purpose they are distributed and for whom they are intended. Along with the development of the Internet, the question of the authenticity of documents arises, which is of primary importance. The researcher must necessarily address these issues otherwise the researcher might end up studying a "falsified" picture of reality.

One of the main advantages of document analysis as a methodology of studying social movements is the discovery of hidden discourses due to the fact that the phenomenon under study is viewed in its own social context and not apart from itself. As a result, this methodology allows us to reconstruct a small but complete picture of reality around the researched phenomenon. The main disadvantages of this method are the time consumption and difficulty of interpreting the material.

Discussion

The methods of researching social movements are different and varied. The choice of methodology and the methods derived from it are first of all limited by the problem, the defined purpose and the available resources. Based on the answers of these criteria above both qualitative and quantitative methodology can be used. Qualitative methodology used in the study of social movements, and respectively qualitative methods can be used to identify the internal structure of the movement, the motives of the participants, the study of collective identity, culture, social networks. Whereas quantitative methodology and quantitative methods are applicable, for example, while studying public opinion on social movements and the development of forecasting models. Each method fills the gap in the study of social movements from different angles. The table below presents the peculiarities of quantitative and qualitative methods that should be taken into account when researching social movements.

Table 1. The features of quantitative and qualitative methods

Criteria	Quantitative methods	Qualitative methods
Research goal	Draw patterns, test the hypothesis	Describe and understand the phenomenon in its environment
Research approach	Measure and validate	Observe and interpret
Research program	Structured	Flexible
Sampling	Statistical Representation	Selected cases
Data Analysis	Statistical generalizations, connections	Decoding meanings related to the social environment
Researchers' Role	The researcher is neutral	The researcher is involved in the process

Thus, looking at the methodologies and methods of studying social movements, it becomes clear that the methodological question posed in the article (Which methodologies and methods are most effective in the study of social movements?) has no clear answer. All the methods discussed have their peculiarities, which allow studying certain aspects or features of the social movement more effectively. Therefore, the most effective methodology for each researcher is the methodology, which, taking into account the available resources, both financial and human, allows gathering reliable information on the issue, implementing the purpose of the research, describing and explaining the characteristics of social movement most comprehensively.

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ԳԱՅԱՆԵ ՀԱՐՈՒԹՅՈՒՆՅԱՆ - Հետազոտելով սոցիալական շարժումները. Մեթոդաբանության ընտրության հիմնախնդիրներ - 19-րդ դարի երկրորդ կեսին աշխարհը բախվեց սոցիալական լայնածավալ շարժումների, որոնք մեկընդմիջտ փոխեցին քաղաքացու և պետության փոխհարաբերությունները: Հասկապես սուֆրաժիստների շարժման սկզբնավորումը, ապա Վիետնամի պատերազմի դեմ ուղղված գործընթացները, ինչպես նաև բազմաթիվ այլ ավելի փոքր չափերի տեղային և կարճաժամկետ սոցիալական շարժումների ազդեցությունը նոր հարցեր առաջադրեցին գիտական հանրության: Ինչպե՞ս ուսումնասիրել սոցիալական շարժումները: Ո՞ր մեթոդն է առավել հարմար և ինչպե՞ս այն կիրառել: Ինչպիսի՞ գիտելիք կարելի է զարգացնել սոցիալական շարժումները ուսումնասիրելով, և ինչպե՞ս այն օգտագործել հոգուտ հասարակության: Այս հարցերի պատասխանները բազմաթիվ են և հակասական նույնիսկ այսօր:

Սույն հոդվածը փորձ է ներկայացնելու սոցիալական շարժումների ուսումնասիրության սոցիոլոգիական հիմնական մեթոդների առանձնահատկությունները, որոնք առանցքային դեր են խաղում երկույթի ուսումնասիրության տեսանկյունից: Հոդվածում քննարկվում են դիտարկման, դեպքի հետազոտման, հիմնավորված տեսության մեթոդաբանության, հարցման և փաստաթղթերի վերլուծության մեթոդների առանձնահատկությունները:

Բանալի բառեր՝ *սոցիալական շարժում, մեթոդաբանություն, դիտարկում, դեպքի ուսումնասիրություն, հիմնավորված տեսություն, փաստաթղթերի վերլուծություն, հարցում, տրիանգուլյացիա*

ГАЯНЕ АРУТЮНЯН- Исследование социальных движений: выбор методологии. - Во второй половине XIX века мир столкнулся с масштабными социальными движениями, изменившими отношения между гражданином и государством. Движения суфражистов, антивоенные движения против Вьетнамской войны, а также возникновение многих других локальных, краткосрочных и маломасштабных социальных движений подняли перед научным сообществом новые вопросы. Как изучать социальные движения? Какой метод лучше выбрать и как его применять? Какие знания можно получить, изучая социальные движения? Какую пользу общество может извлечь из этих знаний? Есть множество противоречивых ответов на эти вопросы. В статье предпринята попытка представить особенности тех социологических методов, которые в основном используются в качестве изучения социальных движений. В статье рассматриваются особенности таких методов исследования, как наблюдение, кейс-стади, обоснованная теория, опрос и анализ документов.

Ключевые слова: *социальные движения, методология, метод, наблюдение, кейс-стади, обоснованная теория, анализ документов, опрос, триангуляция*

National Center of Educational Technologies, sociologist

Շրթական տեխնոլոգիաների ազգային կենտրոնի սոցիոլոգ

Национальный Центр Образовательных Технологий, социолог

gayane.harutyunyan@gmail.com