

INTRODUCTION

For over a century and a half, Harriet Martineau was known to sociologists primarily for having translated Comte's *The Positive Philosophy* into English. Her two-volume (one-thousand pages) "freely translated and abridged" work, as Martineau characterized it, of Comte's original six volumes (forty-seven-hundred pages), was printed in 1853, eleven years after *The Positive Philosophy's* original publication in France. Her edition immediately became the popular version of *The Positive Philosophy* and was almost universally acclaimed as having made Comte's terse prose readable, so much so that Martineau's version was translated back into French, and was soon acknowledged as the official version. Even the egotistical Comte welcomed Martineau's translation with enthusiasm. In a letter to Martineau, Comte wrote: "I am convinced that you have displayed clearness of thought, truth and sagacity in your long and difficult task. . . . The important undertaking that you so happily conceived and have so worthily accomplished will give my *Positive Philosophy* a competent audience greater than I could have hoped to find in my own lifetime" (Harrison 1896:xvii-xviii).

It would not be until over a century later, in 1962, when Seymour Martin Lipset brought out an edited and abridged version of her 1837 book, *Society in America*, that sociologists began to see that Harriet Martineau, in her own right, had fashioned a systematic sociology around the same time as Comte. When Alice Rossi (1973) called Martineau "the first woman sociologist" and Martineau's 1838 book, *How to Observe Morals and Manners*, was reissued in 1989 with an introduction by Michael Hill, the reevaluation of Martineau's place as an important classical sociological theorist began in earnest.

Though an adherent of Comte's positivism, as well as his translator, Martineau, in her own right, formulated a sociological perspective that can be considered an alternative to Comte's sociology. With the rediscovery of Martineau's substantial body of work, we see that she offered the first systematic qualitative methodology for sociology, represented one of the first attempts to analyze class structure, and laid the foundations for what would later become feminist sociology, the sociology of religion, the sociology of inequality, the sociology of occupations, and the sociology of disabilities, to name the more obvious of her endeavors. Not only was Harriet Martineau the first woman sociologist, it is our belief that had she not been a woman living and writing in a patriarchal society, she might have been considered, with Comte, as a founder of sociology. In order to understand Harriet Martineau's sociology (and why she initially was overlooked as an important figure in the history of sociology), we begin, as with all the classical theorists covered in this volume, with her biography and her relationship to the intellectual context of her time.

BIOGRAPHY

Harriet Martineau was born on June 12, 1802 in Norwich, England, to Thomas Martineau, a cloth manufacturer and Elizabeth Rankin, the daughter of a sugar refiner. The sixth of eight children, Martineau "was born entirely without the sense of smell, and very little sense of taste" (Colson 1968:174). Like Comte, she was frail as a child and subject to numerous illnesses, including a progressive form of deafness, which was first diagnosed when she was twelve. Her childhood was an extremely unhappy one, characterized by a suicide attempt and numerous clashes with her mother.¹ According to one biographer:

The deafness was a serious incapacity and a sore trial to nerves and temper. Her family at first thought it was her own fault and accused her of inattention. Next they decided to ignore it and insisted on her "going out" in society as usual. She was the object of perpetual criticism. She became jealous and morose (Courtney 1967:208).

It would not be until Martineau was twenty, when she finally got her "ear trumpet," as she referred to her hearing aid, that she was able to function reasonably well in conversations.

A Significant Decade

Martineau's family were Unitarians, and therefore part of a large dissenting religious tradition in England—a tradition that included Baptists, Quakers, Methodists, and Presbyterians, all of whom refused to accept the state religion of Anglicanism. Because of their dissent, these denominations were denied various civil liberties, including the right to vote and attend universities. Unitarianism was perhaps the most socially progressive of all the dissenting British religions and was one of the few denominations that stressed the importance of education for women. However, due to her frailty, Martineau was schooled at home for most of her childhood. Two notable interruptions to her home schooling were her brief attendance at a small school run by a Unitarian minister, when she was nine, and a year's stay at a boarding school for girls run by her uncle and aunt, when she was fifteen (Hoecker-Drysdale 1992).

A number of events in the 1820s greatly affected the course of Martineau's life; primary was the death of her father in 1826. Thomas Martineau had owned a textile factory and the family tried to keep the factory running after his death. Due to bad investments and a general decline in economic conditions in England, the business failed in 1829. With her younger brother James attending seminary, Harriet, her mother, and those of her sisters still at home were left to support themselves. It was agreed that two sisters would become

¹ In her autobiography, Martineau (1877:vol. 1) even attributed the onset of adult illnesses to psychological strains with her mother. Her younger brother, James, a noted cleric and theologian, questioned his sister's version of her relationship with their mother, claiming that Martineau's recollections of her early life were clouded by her later moods (Courtney 1967).

governesses, and, because she was deaf, Harriet would stay at home with her mother and make a living sewing (at which she was quite proficient) and writing, an area in which she was beginning to carve out a reputation. Her gifts as a writer were evident earlier; at the age of nineteen she published her first article "Female Writers on Practical Divinity," in the Unitarian journal, *Monthly Repository*. Another important event was her brief engagement to a Unitarian minister, a friend of her brother James, John Hugh Worthington, who, after the betrothal, "went insane" and died soon thereafter (Hoecker-Drysdale 1992). Martineau (1877:1:100) was not disheartened, writing in her autobiography:

There has never been any doubt in my mind, that considering what I was in those days, it was happiest for both of us that our union was prevented by any means. . . . I am, in truth, very thankful for not having married at all. I have never since been tempted, nor have suffered anything at all in relation to that matter which is held to be all important to women—love and marriage.

Had her fiancé lived, given the climate of the time and the attitudes toward women, as a minister's wife, even a progressive Unitarian minister, it would have been extremely difficult for Martineau to have continued writing; before she died she wrote more than seventy books and fifteen-hundred newspaper, periodical, and journal articles.

The third, and arguably most important event of her early years, was Martineau's publication of a series of articles on political economy. This massive work, *Illustrations of Political Economy*, was a nine-volume project comprising twenty-five stories written for the reading public, and it dealt with scientific principles concerning the workings of the political economy. The ideas were presented in fictional form as stories illustrating principles designed to help the working and middle class understand the new science of society and to use this understanding to improve their lives. Martineau, at first, had difficulty convincing a publisher of the worth of the endeavor and reluctantly signed an unfavorable printing contract with Charles Fox, brother of Reverend William Johnson Fox, publisher of the *Monthly Repository* (David 1987). To everyone's surprise, except Martineau's, the massive undertaking, published as one story each month, proved to be an immediate success. The volumes became best-sellers, with readers eagerly awaiting each new one. So popular was the series that at one point Martineau outsold the popular English author, Charles Dickens. Even with the unfavorable contract, her political economy series brought financial independence to Martineau, and she was able to pursue the vocation of writer full-time.

The Successful Author

As her success and recognition grew, Martineau traveled widely in England, Europe, America, and the Middle East. These travels produced a number of travel guides to specific regions, books that were much more than the usual travelogues popular at the time. In addition to descriptions of scenery and

places of interest, she described and analyzed the social, political, class, and religious structures of the various countries. In particular, *Society in America* ([1837] 1994) and *How to Observe Manners and Morals* ([1838] 1989) are important precursors to what would eventually become the discipline of sociology.

Society in America ([1837] 1994) demonstrates the beginnings of a comprehensive, empirical-sociological analysis. Martineau organized social interactions by classifying them according to the institution in which they take place. The role of religion, government, economy, slavery, and the position of women were looked at in relation to the discrepancies between the actual conditions in the United States and its professed adherence to democracy. Unlike her contemporary, Comte, Martineau's analysis was grounded in the real world rather than in abstract theories of society and history.

How to Observe Morals and Manners ([1838] 1989) is, according to Lipset ([1962] 1994:7), "perhaps the first book on the methodology of social research in the then still unborn disciplines of sociology and anthropology," predating Durkheim's *The Rules of Sociological Method* ([1895] 1938) by almost half of a century. In *How to Observe Morals and Manners*, Martineau systematically discussed rules for conducting field studies, how to collect data, and roles that sympathetic understanding and generalizations play in developing a conceptual framework for studying society.

After the publications of *Society in America* and *How to Observe Morals and Manners*, Martineau was ill with gynecologic problems, which produced severe back pain and a general loss of physical strength. This resulted in confinement to her home for almost six years (Hoecker-Drysdale 1992). During this period, she continued to write, even writing about her own illness. *Life in the Sickroom*, originally published anonymously in 1844, was a study of illness that focused on the patient and those who attended the patient. When she did not show any improvement, and fearing she would be a lifelong invalid, Martineau turned to the controversial treatment of mesmerism, a treatment based on the belief that magnetic fluid was present in the body and could be regulated by principles of electricity and magnetism.

Martineau's recovery was almost immediate and her pain decreased. This, in turn, allowed her to give up opiates, upon which she had become increasingly dependent. Although, her brother-in-law, Dr. Thomas Greenhow, who had been in charge of her medical care, claimed she had been making progress all along, Martineau was convinced that mesmerism was responsible for her recovery and wrote a book about the experience, *Letters on Mesmerism*, published in 1845. The publication of the book engendered a great deal of controversy with the general public and within Martineau's own family.

Mesmerism was an extremely controversial procedure and presented a real challenge to traditional medicine. The medical establishment was harsh in its criticism of Martineau's account of her recovery. Closer to home, Greenhow, attempting to preserve his medical reputation, published a case study of Martineau's illness, discrediting the mesmerism treatments. (Martineau had

originally given him permission to publish the case in a medical journal, but he instead published it in a popular form.) The result was a rancorous split in the family, with Martineau's mother and sister taking the side of Dr. Greenhow (Hoecker-Drysdale 1992).

Religion and Women's Issues

After this episode, Martineau returned to writing on the theme of religion, which she had written about when younger. Now, however, she had changed her views, moving from the piety of her youth to being a critic of religion. *Eastern Life: Past and Present* (1848), which came out of her travels to the Middle East two years earlier, advocated the position that religion was like any other social institution—it was influenced by changes in the society in which it was found. Using Saint-Simon's and Comte's "Law of Three Stages" as the basis of her analysis, Martineau saw religion as evolutionary, moving from magic and superstition to polytheism, and then to monotheism.

Martineau's next important work, from a sociological perspective, was a collection of short previously published articles dealing with the socialization of children. The articles were brought together in *Household Education* (1849). Two years later, *The Letters on the Laws of Man's Nature and Development*, coauthored with Henry George Atkinson (1851), publicly announced her movement from being a Unitarian theist to an agnostic and a naturalist. The book generated even more controversy than had her views on mesmerism. Conceived of as a work that would expound on the positive philosophy of Auguste Comte (in which she had become very interested), the reading public and her critics instead chose to focus on her agnosticism.²

After the controversy over mesmerism and her religious views, Martineau began a translation of Comte's *The Positive Philosophy*, which was then a great influence on her thought. Coming from a French Huguenot background, and having studied French as a child, she was quite conversant in the language. Martineau's translation, published in 1853, was a success, and not only introduced Comte to the English-speaking world, but, when it was translated back into French, it substantially increased Comte's popularity.

After the Comte translation, Martineau turned again to the social problems of England—focusing primarily on women's issues. Using various publication outlets, such as newspaper editorials, popular journal articles, and book reviews, she argued for specific policies that would help women. One such policy was the Married Women's Property Bill, which was passed by Parliament in 1857, and which changed the divorce laws under which women

² Although Martineau was accused of atheism by many (including her brother, James) it is not clear that this is an accurate description—she never repudiated the idea of a first cause. The term agnostic seems to be a more accurate characterization of Martineau in her later years. It is interesting to note that although Comte's position on religion, as put forth in *The Positive Philosophy*, was similar to Martineau's, it didn't generate the same controversy. This could be attributed to the popular audience that Martineau commanded in England, in contrast to the relative obscurity of Comte in France.

had had little, if any, rights. Another endeavor concerned attempts to repeal the Contagious Disease Acts of 1866 and 1869, which on the surface had been passed to control prostitution, but in actuality “gave indiscriminate power to the police to arrest and humiliate women” (Yates 1985:241).

When Martineau was in her early fifties, illness began to progressively limit her activities. She was incapacitated again, and this time was confined to her home for five years. Her doctors told her she did not have long to live, so she hurried to finish her autobiography, leaving strict instructions that it not be published until after her death. She outlasted the medical predictions by over twenty years, reaching the age of seventy-three, and she continued to write prolifically, even writing her own obituary two weeks before her death on June 25, 1876.

INTELLECTUAL CONTEXT

Harriet Martineau was a contemporary of Comte and, therefore, much of the intellectual climate (though not the political climate) she was exposed to in England was similar to that in Comte’s France. The belief in rationalism, in progress, and in the importance of science as a means to ensure this progress are all central to her writing. She was very much a child of the Enlightenment; she accepted many more of the Enlightenment ideas than Comte.

Among the major intellectual influences on Martineau’s sociology three stand out: Unitarianism, **classical economics**, and the role of women in the nineteenth century.

Unitarianism

Although she rejected the Unitarianism of her childhood and early adolescence, claiming to have broken free when she was fifty (Martineau 1877:vol. 2), the tenets of Unitarianism were never far from her thoughts in every topic on which she wrote.

The Unitarians were considered to be “the most notorious of the Dissenters—as the non-Anglican Protestants had come to be known in eighteenth-century England” (Hutcheon 2001:23). What is important to understand about Martineau’s relationship to Unitarianism is that the religion in which she was raised was almost unique among religions of the time. Unlike so many other religions, Unitarianism offered a worldview that was not viewed as being in conflict with science. Unitarianism was composed of a large percentage of scientifically-oriented thinkers who saw science as essentially evolving along with religion.³ For Unitarians, religion would ultimately give way to

³ The conflict between science and religion would become more pronounced with the publication, in 1859, of Charles Darwin’s *On the Origin of Species* ([1859] 1890).

science, with science becoming the basic source of knowledge, including moral and ethical knowledge (Hutcheon 1998).

An essential tenet of Unitarianism was **necessarianism**, which held that although God created the universe, he still was subject to all of its laws. For Martineau, these laws operated according to fixed and discoverable principles that governed natural and social life. Given her acceptance of social laws operating in society, the question of free will and free choice was raised. Martineau interpreted necessarianism in the social world to mean that choice existed in the moral realm. Choice is a part of the practicalities of everyday living, and each choice opens up the possibility of more choice. Reason and conscience make each person responsible for his/her own actions. Initially specializing in subjects that were considered appropriate for women (religion and education), she became versed in the workings of political economy, which she saw as following natural laws, and she felt that if it were understood by the average person, it would enable them to make choices that could improve their lives. Unitarianism offered a belief in a natural order to existence, one subject to natural laws with which God could not interfere or change. Science was the mechanism for uncovering these laws.

Martineau's Unitarianism meshed well with the Enlightenment philosophes' acceptance of the idea of progress through scientific knowledge. She saw the society of her time as being at a critical juncture which, through the application of scientific principles, would eventually lead to a new order. She grew increasingly interested in social science, concerned with the question of defining social science (sociology) and providing a framework for the analysis of society. Still, for her, the science of society had to be useful. It had to address the problems of living in society, something that was basic to Unitarianism and which also was compatible with the classical economic ideas she embraced and sought to make available to the general public.

Classical Economics

Classical economics refers to the thought of a group of economists in the eighteenth and nineteenth centuries, the most well-known of whom is the Scottish economist and moral philosopher, Adam Smith (1723–1790). Smith's most famous work, *An Inquiry into the Nature and Causes of the Wealth of Nations* ([1776] 1976) analyzed the consequences of economic freedom, the role of self-interest, the division of labor, and the role of markets. Smith championed free trade and competition as the best ways of holding economy and society together. He believed there was order, both natural and social, to the world God had created. A laissez-faire approach was his answer to all problems of the economy. The economy needed to be left alone to work itself out and produce a balanced order.

Although it had an immediate impact on economic thought, *Wealth of Nations* was a difficult book to read. David Ricardo (1772–1823), another important classical economist, wanted to clarify Smith. In *The Principles of Political Economy and Taxation* ([1817] 1996), Ricardo introduced the notions

of technological progress and foreign trade into the mechanisms by which the economy would regulate itself. According to Ricardo ([1817] 1996), it was impossible to have a "general glut"—an excess supply of all goods in an economy. He focused on agriculture, arguing that with wages at their natural level, the rate of profits and wages would be determined by the agricultural market.

James Mill (1773-1836), the father of John Stuart Mill, was another leading classical economist who sought to clarify Adam Smith's ideas. His book, *Elements of Political Economy* ([1821] 1971), was the leading textbook of classical economics when Martineau began her series on political economy, and Mill had a large influence on her thought. Martineau's division of the political economy series into the divisions of production, exchange, and consumption was based on Mill's *Elements of Political Economy* ([1821] 1971). Like other classical economic theorists, Mill was an advocate of nongovernmental intervention in the economy. He was against any type of redistribution schemes, arguing for the maintenance of the status quo and excluding social justice from any considerations concerning society. It was Mill who was mostly responsible for modifying and popularizing Adam Smith's argument that each person acts in his own self-interest, and any collection of people necessarily acts in the interest of the whole.

One other influence on Martineau worth mentioning is that of Jane Haldimand Marcet (1769-1858) whose popular work on political economy, *Conversations on Political Economy* (1817), Martineau read before beginning her own political economy series. Marcet's book presented classical economic theory in the form of a conversation between a pupil, Caroline, and her tutor, Mrs. B. Drawing heavily on Adam Smith and David Ricardo, Marcet's *Conversations on Political Economy* was a noncritical exposition of the principles of classical political economy, intended largely for the education of the young and upper-class lay people. Its popularity was the inspiration for Martineau to try her hand at popularizing economics in an altered form by using fictitious stories to illustrate political economic principles.

Although Martineau popularized the thought of the classical economists, she did not accept all of their views. In particular, because of her Unitarian beliefs, she was an advocate of social justice, which was overlooked by the classical economists in their noninterventionist, or laissez-faire, approach to government and society. This aspect of Martineau is readily apparent in her condemnation of slavery in the political economy series. This was a theme she would return to in *Society in America*, in which she was one of the first intellectuals to make the comparison between the way slaves were treated and the way women were treated.

The Role of Women in the Nineteenth Century

One cannot understand Martineau's thought without taking into account the patriarchal nature of the society and the times in which she lived. By not accepting the traditional role of a woman (that is, not marrying, supporting herself, and traveling to other countries), she was not only able to see the

limits that were placed on other women, but was also in a position to call these limits into question.

"The Women Question", as she referred to it, was always important to Martineau. As David (1987:46) writes, "She wanted women to be more like herself—rational, confident, the intellectual equal of any man, or certainly enough to sanction his ideas." Martineau, of course, realized that this was not an easy task to accomplish. At the time, few women were writers, and many still used male pen names.⁴ Most women authors wrote novels, religious thoughts, advice to mothers, or children's stories. Few women tackled the "serious" subjects addressed by male writers. Educating and ministering to those in need were traditional roles for women. Even Martineau's *Illustrations of Political Economy*, which had launched her career as an author, initially met with discouraging comments when first proposed. James Mill was said to have told her prospective publisher that he did not think her endeavor would be successful. Mill, to his credit, admitted two years later that he had made a mistake (Hoecker-Drysdale 1992). It was only through Martineau's staunch belief in herself, and the encouragement of her family, that she even embarked on the political economy series.

Again, her Unitarian upbringing was important for understanding her writings on The Women Question. The overwhelming majority of women in Victorian England were not educated and were not expected to play a role in the intellectual environment. Martineau's Unitarianism made her an exception, and her staunch advocacy of education was a major theme, beginning with the second article she published. Also, she was adamant in her calls for equal pay for equal work for women.

Martineau brought together statistical, historical, and sociological facts to address the changes in women's industrial work. It was a comprehensive and thoughtful analysis of the labor of women and the issues which needed to be addressed to correct inequalities. She laid to rest the myths that women are supported economically by men and do not constitute labor or paid work. She emphasized that fifty percent of women (three million out of six million in Great Britain at the time) were breadwinners, nearly two-thirds of those (or two million) self-supporting (Hoecker-Drysdale 1992:118-19).

Martineau was also very much concerned with the health of women, pointing out that the demands made on them, in particular on servants and those in domestic work, had a debilitating effect on their health.

Although Martineau broke stereotypes, she was still a product of her time, and had to consider society's expectations of her as a woman. Even after the success of the political economy series, and her subsequent best-selling books on the cultures of other countries, she had to be careful

⁴ Harriet Martineau's first publication in the *Monthly Repository*, "Female Writers on Practical Divinity," was published under a male pseudonym.

how she presented herself and in selecting the types of writing she engaged in. For example, with the publication of *Society in America* in 1837, Martineau was widely recognized as a leading intellectual and social analyst in England. Yet when the publishers, Saunders and Otley, asked her to edit a new periodical that would focus on the major issues of the day through the lens of political economy, she was racked with insecurity about her ability to take on this new role and with the implications of the endeavor (Hoecker-Drysdale 1992; Hunter 1995). If she failed at editing the journal, it would not only damage her reputation, but would be seen as a setback for all women authors. In the end, Martineau opted against taking the editorship. The decision appears to have been based not only on concerns about her personal abilities, but also, at least in part, because she was aware of the implications her actions would have for other professional women in a society that frowned on their independence.

MARTINEAU'S SOCIOLOGY

Harriet Martineau's sociology is grounded in the empirical observations she made of the actual workings of society. Unlike Comte, who sought to develop theories based on universal laws of human nature and interaction, Martineau was concerned with developing theories that were specific to particular institutions in society—the role of women, education, religion, social inequality, disability, and occupations—areas which would eventually become subfields in sociology. Her interests ran along the lines of what Robert Merton (1957) would later call “Theories of the Middle Range.” It is extremely important to recognize the role of methodology, rather than that of grand theory, in her overall sociology.

Methodology and Morals

Although Martineau wanted sociology to study ‘things’ (what Durkheim six decades later would call “social facts”⁵), it cannot be overlooked, in describing Martineau's early attempt to fashion a sociology, that she steadfastly held that sociology was not just a descriptive science, but was *a critical and moral science as well*. Sociology, the study of society, began for her with a moral imperative—to oppose domination. She was against anything that limited a person's ability to function as a free moral agent.

The condition of the less powerful, society's ideas about liberty and equality, and the progress society was making in providing for all people to be moral agents, were the keys to understanding how much domination was present in

⁵ In *The Rules of Sociological Method* (1895:14), Emile Durkheim wrote, “The first and most fundamental rule is: consider social facts as things.”

any society (Martineau [1838] 1989). This was why she was able to zero in on the parallels between the domination of slaves and the domination of women. The denial of a woman's political and economic rights erodes her capacity for moral agency, just as it did for slaves.

Martineau tried to ascertain what morals each society said it aspired to and how this compared to actual practices, using each society as its own control to understand domination. Always a social activist, she used social justice as a standard against which to measure society's progress.

In order to understand the workings of society, Martineau had to first observe them. In order to systematically observe, she needed a method of observation. Given the infancy of the fields of social sciences or sociology, there was no methodology; Martineau literally had to invent a sociological methodology as she went along. She first began to develop such a systematic methodology as a note-taking guide for her trip to America. As Lipset ([1962] 1994:7) says:

On shipboard in 1834, on her way to a two year intensive study of American society, she wrote the first draft of what later became a volume of instructions to travelers seeking to study foreign cultures, *How to Observe Morals and Manners*. This volume is perhaps, the first book on the methodology of social research in the still unborn disciplines of sociology and anthropology.

Written in simple, readable English, *How to Observe Morals and Manners* was addressed to the general public, not to intellectuals or elites.⁶ Though published one year after *Society in America*, the observations and analyses in *Society in America* are based on ideas presented in *How to Observe Morals and Manners*. Because the framework for sociological analysis was first laid out in notes for *How to Observe Morals and Manners*, rather than treating the two books chronologically according to publication date, we begin with *How to Observe Morals and Manners* in our explication of Martineau's sociology.

How to Observe Morals and Manners illustrates not only Martineau's methodology for sociology, but also her belief that everyone was capable of learning how to study society, provided they were given guidance. In essence, she returned to the theme of *Illustrations of Political Economy*—she made principles of understanding generally accessible through the presentation of a method of sociological analysis, a way to observe people as they went about their daily activities living in society. *How to Observe Morals and Manners* is a primer for conducting field studies. For Martineau, carefully collected and analyzed facts form the basis for understanding the elements of society—its **morals and manners**. Morals and manners are the general terms she used to describe the subject matter of sociology. By morals, she meant a society's

⁶ Her use of the word "traveler" throughout *How to Observe Morals and Manners* points to her desire to educate the average reader.

idea of prescribed and proscribed behavior, what later sociologists would refer to as norms.

Manners are “the patterns of actions and associations in a society,” what later sociologists would call **institutions**. Martineau argues that morals and manners are intertwined. The job of the sociologist is to describe, explain, and evaluate the relationship between morals and manners, in a given society at a given moment in time. The individual is the link to a society’s morals, or principles on one hand, and its manners or interaction, practices on the other. *How to Observe Manners and Morals* calls for the observer to pay close attention to the contradictions between morals and manners—to the differences between the ideal and the real in society. It is this approach to sociological methodology that enabled Martineau to see slavery and the role of women as obvious contradictions.

How to Observe Morals and Manners was the first book of its kind. It is a text on social science methodology and clearly describes many of the methods still used today in qualitative theory. For example, Martineau provided guidelines for developing questions and conducting qualitative interviews. “Nothing need be said on a matter so obvious as the necessity for understanding the language of the people visited” (Martineau [1838] 1989:67). She advised the traveler how to discover and record information:

To keep himself up to his business, and stimulate his flagging attention, he should provide himself, before setting out, with a set of queries, so prepared as to include every great class of facts connected with the condition of a people, and so divided and arranged as that he can turn to the right set at the fitting moment. These queries are not designed to be thrust into the hand of any one who may have information to give. They should not even be allowed to catch his eye. The traveler who has the air of taking notes in the midst of conversations, is in danger of bringing away information imperfect as far as it goes, and much restricted in quantity in comparison with what it would be if he allowed it to be forgotten that he was a foreigner seeking information. If he permits the conversation to flow on naturally, without checking it by the production of the pencil and tablets, he will, even if his memory be not of the best, have more to set down at night than if he noted on the spot, as evidence, what a companion might be saying to him (Martineau [1838] 1989:232–33).

The above advice leads to keeping journals, diaries, and a field notebook in order to build a base of knowledge. This approach to participant observation, with slight modifications, is still used today: sociologists and anthropologists are taught to write-up field notes at the end of the day.

Individual differences in the characteristics, abilities, and predispositions of travelers can make for bias and can affect the recording of information. Travelers must be aware of their biases at all times; they must keep an open mind about what is observed and must be reflective enough to recognize any biases they might have. The key to understanding the society under analysis is

impartiality, which can only be achieved when the observer develops “a sympathetic or empathetic understanding of people’s ongoing daily life, selecting ‘things’ that illuminate the meanings of this . . . reality” (Lengermann and Niebrugge 2001:78).⁷

Using the methods developed in *How to Observe Morals and Manners*, Martineau went on to write detailed studies of other cultures, such as the Middle East and, closer to home, Ireland. In these works, using a comparative method of analysis, she examined both the economic and moral aspects of societies, describing and then comparing them to each other.

Methodology Continued: Women and Slavery

If *How to Observe Morals and Manners* was a blueprint of how to do research, *Society in America* provided empirical verification of points laid out in the former. *Society in America* was a radical book for its time.⁸ Martineau criticized the United States for its treatment of women and slaves (supporting the abolitionists), and called for the equalization of property, a tenet of socialism. She argued that there was a need for foreign observation, what Comte had referred to as comparative analysis; she focused on institutions, because this was where the locus of morals and manners lie.

Martineau concentrated on how social actions and interactions can be classified by looking at them in relationship to the institutions in which they take place. The observer, the sociologist, needs to focus upon the interrelations of institutions and the behavior of people. Being a woman was an advantage—it enabled the observer who was a woman to see more of domestic life. This point was later utilized by anthropologist Franz Boaz, who trained an entire generation of women anthropologists, including Margaret Mead and Ruth Benedict, based on this simple fact that women have access to certain behaviors in a society which men do not.

Because Martineau starts from a moral imperative, *Society in America* is concerned with what American society professes and what it actually practices. Hoecker-Drysdale (1992:61) expresses it this way:

The ideal of equality, upon which the Republic was founded, confronted such contradictions as the dependent status of women, their ‘political nonexistence,’ and the institution of slavery. Martineau discussed the similarities in the two cases of oppression; the nation of equals was, in reality, a polity of white privileged males.

Martineau was quite systematic in her analysis of America’s institutions, beginning with politics and ending with religion. Her consistency is

⁷ Martineau was struggling with the same question of objectivity that Weber would tackle more than a century later.

⁸ This may be the reason that de Tocqueville’s much less critical *Democracy in America* ([1835] 1875) is generally considered to be the standard work on American society, written by a foreigner, and why *Society in America* was overlooked for over a century.

apparent as she zeroed in on how the professed ideal political structure is carried out in practice. If, as American society holds, "rulers derive their just powers from the consent of the governed," then there should be no narrowing of the political power of those being governed. The existence of slavery and the role of women contradicted this and Martineau ([1837] 1994:233) was compelled to say, "One of the absolutely inevitable results of slavery is a disregard of human rights; an inability even to comprehend them." Slavery had produced a caste system and an aristocracy of wealth that was an anathema to her.

It is no coincidence that she was one of the first, if not *the* first, intellectual to point out the similarities of the role of woman and the role of slaves in American society. This is one of the key insights found in *Society in America*. Lipset (1994:34) says:

Supporters of both white and male supremacy have argued that Negroes and women are happier without responsibility, their basic temperaments do not fit them for various important tasks, they benefit greatly from the protection of the more powerful group, and they prefer their inferior position. To Harriet Martineau these were simply the rationales employed by the privileged to justify their position, and in the case of women they represented the preservation of outmoded doctrines and practices inherited from feudal and aristocratic society. The position of women differed from that of Negro slaves, however, in that they had much more opportunity to fight for their own freedom.

Martineau's sociological analysis emphasized the role of the American value system as a causal agent. She saw moral values as a major factor shaping America's institutions. In this approach to the role of values, Martineau anticipated the social analysis of race relations offered by Gunnar Myrdal in his 1944 work, *An American Dilemma* (Lipset 1994).

Martineau's condemnation of how women were treated in America, though less strong in its criticism than her critique of slavery, was powerful. As with slavery, she was up front in her condemnation of the situation of women in America: "The unconsciousness of both parties as to the injuries suffered by women at the hands of those in power is a sufficient proof of the low degree of civilization in this important particular at which they rest." Not only did the treatment of women in America fall short of America's "own democratic principles, but the practices of some parts of the Old World" (Martineau [1837] 1994:291).

This view of women and African-American slaves as being on an equally discriminated level comes out of the basic idea of human equality, so central to Unitarianism. Necessarianism, as she interpreted it, also gave women the choice to change the conditions under which they lived, a choice that slaves did not have. Hence, it was incumbent upon women to change the society in which they lived. Before they could adequately exercise their choices, they had to have an understanding of society. This was where sociology entered the picture.

As stated before, Martineau was not interested in grand theories about behavior, and she concluded *Society in America* by modestly stating, "My book must come to an end; but I offer no conclusion of my subject. I do not pretend to have formulated any theory about American society or prospects to which a finishing hand can be put in the last page" (Martineau [1837] 1994:355). As also stated before, she developed sociologies of subareas in sociology. We now turn to some of these subfields.

Feminist Sociology

Martineau was not only the first woman sociologist; she was also the first feminist sociologist.⁹ Aware that inferior education restricted women in their ability to excel in professions or to achieve even basic competence in the work world outside home, Martineau was a champion of equal education. In her view, not educating women was a gross injustice. She pointed out that women should be educated in order to prepare them to carry out their duties and roles effectively, particularly since many women were no longer sheltered and protected. This theme of educating women was something Martineau called for throughout her life, beginning with the second article she published. In her early years she stressed education for women "to enhance their companionship with men and improve their teaching of their own children." However, as she became a public figure, and her feminist consciousness grew, "She encouraged the idea of education for women for its own sake" and supported the establishment of colleges and medical schools for women (Yates 1985:21).

Although the Women's Suffrage Movement did not begin until the 1860s while Martineau's health precluded taking an active part in the movement, she made her views on political and social equality for women known through her journalistic writing. In her autobiography, she wrote:

I have no vote at election, though I am a tax-paying housekeeper and responsible citizen; and I regard the disability as an absurdity, seeing that I have for a long course of years influenced public affairs to an extent not professed or attempted by many men (Martineau 1877:1:303).

Martineau was ambivalent about marriage because of the inequities associated with it. According to Yates (1985:23):

Martineau was outspoken about the degradation and limits imposed on women by marriage, but she was understandingly ambivalent in some of her statements and contradictory in some of her behavior having to do with marriage. In her time and place where marriage was so definitively normative for women, the wonder is that she was at times so piercingly

⁹ Yates (1985:53) writes: "Harriet Martineau was a lifelong feminist, and she became one early and on her own. 'The women question' was what she and other like-minded, nineteenth-century thinkers and activists called what we call feminism."

critical of marriage in general, not that most of the time she fostered and approved of specific marriages between people she knew. This too is more consistent with contemporary feminists' views of the disabilities of marriage than with those of Martineau's own time.

She was less ambivalent about divorce, and supported laws that made divorce less favorable for men. She wanted to make it easier for women to leave a marriage without giving up their property rights. She advocated that divorce become part of common law and not be under the jurisdiction of Parliament and the Church of England, bastions of male supremacy. In editorial after editorial, she wrote of the need for women, particularly poor women, to have access to divorce when they were in cruel and brutal marriages (Yates 1985). In *Eastern Life: Past and Present* (1848), she described harem women as being the most oppressed of any group of women of which she was aware.

Another important feminist concern is equality in the workplace. Here, too, Martineau was ahead of her time, forcibly arguing for the rights of working women. She observed that work performed by subordinated people is seen by society as an indication of inferior status. Women's work was given little recognition, even though in many instances it was harder than men's work.¹⁰ Using statistics to make her case, Martineau pointed out that, as reported in the census of 1851, 6 million Englishwomen worked outside the home and 4 million of these were the sole support of their families (Hoecker-Drysdale 2001). Martineau looked empirically at the lot of women in Victorian England. Finding that women were being exploited, she advocated the moral imperative against domination and called for changes to be made based on social fairness for all members of society. In Martineau's words:

There can be but one true method in the treatment of each human being of either sex, of any color, and under any outward circumstance—to ascertain what are the powers of that being, to cultivate them to the utmost, and then to see what actions they will find for themselves. This has probably never been done for men, unless in some rare individual cases. It has certainly never been done for women (Yates 1985:53).

Always the champion of social justice, Martineau laid the groundwork for feminist sociology, which advocates not only the liberation of women but also that of men.

Sociology of Religion

Well before Durkheim, considered one of the pioneers in the field, Martineau attempted to develop a sociological understanding of religion. In one of her earliest attempts to show the interrelationship of society and religion, she pointed out in *Society in America* how democracy can be traced to

¹⁰ This insight would be reiterated over a century later by one of the leading contemporary feminist sociologists, Dorothy Smith (1987).

Christianity. She was, however, critical of religion as it was practiced in the United States.

During her 1846 trip to the Middle East, she began to look critically at the interrelationship between religion and society, which she thought essential if an observer was to truly understand the religion of a country. In *Eastern Life: Past and Present* she offered a radical proposal that Judaism, Christianity, and Islam arose from early Egyptian religions. Using sociological, cultural, and historical facts to support her case, Martineau argued that religion is evolutionary and passes through historical stages, and religious evolution is related to human progress. Religion, from a sociological perspective, is a human institution and needs to be studied as such, not as a metaphysical entity.

Her travels in the Middle East confirmed her growing belief in the historical rather than revelatory nature of Christian theology. *Eastern Life: Past and Present* offered a theory of the history and evolution of religions. Reflecting in her autobiography about walking through ancient ruins:

It was evident to me, in a way which could never have been if I had not wandered amidst the old monuments and scenes of various faiths, that a passage through these latter faiths is as natural to men, as was as necessary in those former periods of human progress, as fetishism is to the infant nations and individuals, without the notion being more true in one case than in the other. Every child, and every childish tribe of people, transfers its own consciousness, by a supposition so necessary as to be an instinct, to all external objects, so as to conclude them all to be alive like itself; and passes through this stage of belief to a more reasonable view: and in like manner, more advanced nations and individuals suppose a whole pantheon of Gods first,—and then a trinity,—and then a single deity,— all the divine beings being exaggerated men, regarding the universe from the human point of view, and under the influences of human notions and affections (Martineau 1877:1:538)

Her relativistic analysis of Christianity was greeted with mixed reviews. Some were scandalized, others acclaimed her insight. Perhaps Martineau's most controversial foray into the sociology of religion was *Letters on the Laws of Man's Nature and Development*, coauthored with Henry George Atkinson and published in 1851. It received varied reactions, and represented her break with her Unitarian upbringing. Reviewers, for the most part, focused on her agnosticism and naturalism rather than the ideas presented in the book: the unity of nature, experience, perception, and reality.¹¹ In *Letters on the Laws of Man's Nature and Development*, Martineau came to essentially the same conclusion

¹¹ One of the chief critics of the work was Martineau's younger brother, James, who was by then a leading Unitarian minister. Though used to criticism, she was hurt by her brother's critique.

regarding religion as Comte. She rejected the supernatural aspects of religion, but saw its integrative potential.¹²

Sociology of Inequality

Like Karl Marx, Martineau framed history in social and economic contexts, examining “social continuities,” progress, and the influence of social institutions on each another (Hoecker-Drysdale 1992). She examined both social movements and social classes and how they affected the course of history. This was an approach she took in the first volume of *The History of England During the Thirty Years Peace: 1816–1846* (1849a). For Martineau, consecutive events of social history were indicative of progress or change.

In advance of Marx, Martineau described the role of class in society. *How to Observe Manners and Morals*, along with its research methodology, also contains the beginnings of a theory of class. In a chapter on the concept of liberty, Martineau divided society into classes and identified types of class conflict and their historical and contemporary origins:

Whether the society is divided in Two Classes, or whether there is a Gradation, is another consideration. Where there are only two, proprietors and labourers, the Idea of Liberty is deficient or absent. The proprietary class can have no other desires on the subject than to repress the encroachments of the sovereign above them, or of the servile class below them: and in the servile class the conception of liberty is yet unformed. Only in barbarous countries, in countries where slavery subsists, and in some strongholds of feudalism, is this decided derision of society into two classes now to be found. Everywhere else there is more or less gradation; and in the most advanced countries the classes are least distinguishable. Below these members who, in European societies, are distinguished by birth, there is class beneath class of capitalists, though it is unusual to comprehend them all, for convenience of speech, under the name of middle class. Thus, society in England, France, and Germany is commonly spoken of as consisting of three classes; whole divisions of the middle class are, in fact, very numerous. The small shopkeeper is not of the same class with the landowner, or wealthy banker, or professional man; while their views of life, their political principles, and their social aspirations, are as different as those of the peer and the mechanic (Martineau [1838] 1989:193–94).

Martineau identified the relationship between class structure and liberty and, like Marx, recognized interactions between labor and capitalists, while also anticipating some of Weber’s thinking on the development of meritocracies. In addition to looking at class, she ([1838] 1989) examined the institutions of

¹² Martineau, though, rejected Comte’s ‘Religion of Humanity’, and omitted the last ten pages of his *The Positive Philosophy*, material that showed Comte’s movement toward this position. Frederick Harrison restored the ten pages when he wrote his introduction to the 1896 edition of *The Positive Philosophy*.

servitude and the relationship of forms of interaction between servant and master to the history and culture of a country. She did this by using a comparative approach to develop theories about the different nature, structure, and generation of the institution of servitude in different countries, and the effects on the roles and behavior of servants and masters.

Martineau also analyzed social organization in Egypt, which at the time included a five- to seven-step caste system. She compared life in the Middle East to life in America, England, and Ireland and, using her moral imperative, found Egyptian society falling far short of western nations.

Not only did Martineau study large-scale political and economic power structures, she also examined the small scale—the cultural patterns that were part of daily life—which, in her opinion, defined much of the nature of societies. In keeping with the major themes of her work, she noted the historical absence of the mention women, minorities, slaves, and other members of disempowered classes in the societies she studied.

Sociology of Work and Occupations

As in so many other areas, Martineau was a pioneer in analyzing work and occupations from a sociological perspective. The division of labor, disparities in jobs, alienation from work, and inequality among men and women in the workplace, were topics that she wrote about. Her sociology of work can be divided into two major areas: work as the essence of self, and work as the object of scientific study (Hoecker-Drysdale 2001).

In her early writing Martineau was influenced by Unitarianism as reflected in the Calvinist work ethic that saw work as a moral duty. Later, as she developed a methodology and a sociological perspective, she added to her moral perspective an analysis of how work was related to the increasing industrialization of society.

Her studies of domestic work (Martineau 1838a; 1838b; 1862) deal with the theme of subordination and how it restricts development of women and the poor. *England and Her Soldiers* (1859) compared health studies of the military to other occupations, and *Health, Husbandry and Handicraft* (1861) looked at the manufacturing processes in industrialization.

In her sociological studies of work, Martineau sought to accomplish a number of objectives. First, she wanted to educate the general public, through detailed empirical studies as to how society was changing as technology progressed. She also wanted to analyze the changes in the division of labor and social structures. A third objective was to sociologically analyze various occupations in society. Through all of this, she wanted to critique what was occurring and reveal the deplorable conditions of women, slaves, and children (Hoecker-Drysdale 2001).

Sociology of Illness and Disability

Given her self-reflexivity, one would expect that Martineau would write about her own disabilities. According to Deegan (2001:43–46), she articulated a six-stage model for adjusting to and dealing with the limitations of deafness. The stages were: denial, shame, floundering, acceptance, integration

or making lemonade, and the uncertain stages of impairment. The first stage, denial, is self-explanatory; she denied she was losing her hearing. The second stage was characterized by social pain arising from a sense of shame. The first two stages were followed by disorder and floundering as she tried to come to grips with her deafness. In the fourth stage she accepted her deafness and began to adapt to the condition. Stage five involved changing daily habits and making a positive life choice to be as cheerful, active, and capable as she could be. With a new sense of self, Martineau entered the last stage and tried various methods to cure her deafness. These stages, and Martineau's coping with her deafness, were published in 1834 in an article, "Letters To The Deaf" (Deegan 2001).

During her first extended illness she decided to write on the social experiences of being an invalid. In 1843 she began a series of essays, later published anonymously in 1844 as *Life in the Sickroom*. The work provides a sociological analysis of illness, examining it from the point of view of the patient as well as the caretakers.

In sum, Martineau sought to create a science of sociology that would be systematically grounded in empirical observation and accessible to the general public, a sociology that would enable people to make personal and political decisions guided by a scientific understanding of the principles governing social life. She did this by fashioning a methodology for sociology and through her investigations into what was called, at the time, The Women Question (what can now be labeled feminist sociology), the sociology of religion, the sociology of inequality, the sociology of work, and the sociology of disabilities, all now established subareas in modern sociology.