INTRODUCTION TO SOCIOLOGY – 2ND CANADIAN EDITION

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FOR SOCIOLOGY 1125

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Changes to this book, as a whole, were made to achieve the following goals.

1. Replace U.S.-centric content with Canadian content. This included examples, case studies, significant figures, perspectives and, more pragmatically, spelling, idioms, measurements and grammatical structure and style.
2. Add feminist theory and feminist perspectives throughout the text.
3. Add Canadian aboriginal perspectives and content.
4. Added chapter on Religion

Key Terms, Section Summary, Quiz, Further Research, and References in each chapter have been updated to reflect new chapter content.

For a detailed list of the changes and additions made to this book, see "2nd Canadian Edition Changes".

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From OpenStax College, creator of the original textbook

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Chapter 1. An Introduction to Sociology



Figure 1.1. Sociologists study how society affects people and how people affect society. How does being in a crowd affect people's behaviour? (Photo courtesy of PDerek Hatfield/Wikimedia Commons)

Learning Objectives

1.1. What Is Sociology?

- Explain the concepts central to sociology.
- Describe the different levels of analysis in sociology: micro-level sociology, macro-level sociology, and global-level sociology.
- Define the sociological imagination.

1.2. The History of Sociology

- Explain why sociology emerged when it did.
- Describe the central ideas of the founders of sociology.

1.3. Theoretical Perspectives

- Explain what sociological theories and paradigms are and how they are used.
- Describe sociology as a multi-perspectival social science divided into positivist, interpretive and critical paradigms.
- Define the similarities and differences between quantitative sociology, structural functionalism, historical materialism, feminism, and symbolic interactionism.

1.4. Why Study Sociology?

- Explain why it is worthwhile to study sociology.
- Identify ways sociology is applied in the real world.

Concerts, sporting matches and games, and political rallies can have very large crowds. When you attend one of these events you may know only the people you came with, yet you may experience a feeling of connection to the group. You are one of the crowd. You cheer and applaud when everyone else does. You boo and yell alongside them. You move out of the way when someone needs to get by, and you say "excuse me" when you need to leave. You know how to behave in this kind of crowd.

It can be a very different experience if you are travelling in a foreign country and you find yourself in a crowd moving down the street. You may have trouble figuring out what is happening. Is the crowd just the usual morning rush, or is it a political protest of some kind? Perhaps there was some sort of accident or disaster. Is it safe in this crowd, or should you try to extract yourself? How can you find out what is going on? Although you are *in* it, you may not feel like you are *part* of this crowd. You may not know what to do or how to behave.

Even within one type of crowd, different groups exist and different behaviours are on display. At a rock concert, for example, some may enjoy singing along, others may prefer to sit and observe, while still others may join in a mosh pit or try crowd-surfing. On February 28, 2010, Sydney Crosby scored the winning goal against the United States team in the gold medal hockey game at the Vancouver Winter Olympics. Two hundred thousand jubilant people filled the streets of downtown Vancouver to celebrate and cap off two weeks of uncharacteristically vibrant, joyful street life in Vancouver. Just over a year later, on June 15, 2011, the Vancouver Canucks lost the seventh hockey game of the Stanley Cup finals against the Boston Bruins. One hundred thousand people had been watching the game on outdoor screens. Eventually 155,000 people filled the downtown streets. Rioting and looting led to hundreds of injuries, burnt cars, trashed storefronts and property damage totaling an estimated $4.2 million. Why was the crowd response to the two events so different?



Figure 1.2. People's experiences of the post-Stanley Cup riot in Vancouver were very different. (Photo courtesy of Pasquale Borriello/Flickr)

A key insight of sociology is that the simple fact of being in a group changes your behaviour. The group is a phenomenon that is more than the sum of its parts. Why do we feel and act differently in different types of social situations? Why might people of a single group exhibit different behaviours in the same situation? Why might people acting similarly not feel connected to others exhibiting the same behaviour? These are some of the many questions sociologists ask as they study people and societies.

1.1. What Is Sociology?

A dictionary defines **sociology** as the systematic study of society and social interaction. The word "sociology" is derived from the Latin word *socius* (companion) and the Greek word *logos* (speech or reason), which together mean "reasoned speech or discourse about companionship". How can the experience of companionship or togetherness be put into words or explained? While this is a starting point for the discipline, sociology is actually much more complex. It uses many different theories and methods to study a wide range of subject matter, and applies these studies to the real world.



Figure 1.3. Sociologists learn about society as a whole while studying one-to-one and group interactions. (Photo courtesy of Robert S. Donovan/Flickr)

The sociologist Dorothy Smith (b. 1926) defines *the social* as the "ongoing concerting and coordinating of individuals' activities" (Smith, 1999). Sociology is the systematic study of all those aspects of life designated by the adjective "social." They concern relationships, and they concern what happens when more than one person is involved. These aspects of social life never simply occur; they are organized processes. They can be the briefest of everyday interactions — moving to the right to let someone pass on a busy sidewalk, for example — or the largest and most enduring interactions — such as the billions of daily exchanges that constitute the circuits of global capitalism. If there are at least two people involved, even in the seclusion of one's mind, then there is a social interaction that entails the "ongoing concerting and coordinating of activities." Why does the person move to the right on the sidewalk? What collective processes lead to the decision that moving to the right rather than the left is normal? Think about the T-shirts in your chest of drawers at home. What are the sequences of linkages, exchanges, and social relationships that connect your T-shirts to the dangerous and hyper-exploitative garment factories in rural China or Bangladesh? These are the type of questions that point to the unique domain and puzzles of *the social* that sociology seeks to explore and understand.

What are Society and Culture? Micro, Macro and Global Perspectives

Sociologists study all aspects and levels of society. A **society** is a group of people whose members interact, reside in a definable area, and share a culture. A **culture** includes the group's shared practices, values, beliefs, norms, and artifacts. One sociologist might analyze video of people from different societies as they carry on everyday conversations to study the rules of polite conversation from different world cultures. Another sociologist might interview a representative sample of people to see how email and instant messaging have changed the way organizations are run. Yet another sociologist might study how migration determined the way in which language spread and changed over time. A fourth sociologist might study the history of international agencies like the United Nations or the International Monetary Fund to examine how the globe became divided into a First World and a Third World after the end of the colonial era.

These examples illustrate the ways in which society and culture can be studied at different *levels of analysis*, from the detailed study of face-to-face interactions to the examination of large-scale historical processes affecting entire civilizations. It is common to divide these levels of analysis into different gradations based on the scale of interaction involved. As discussed in later chapters, sociologists break the study of society down into four separate levels of analysis: micro, meso, macro, and global. The basic distinctions, however, are between **micro-level sociology**, **macro-level sociology** and **global-level sociology**.

The study of cultural rules of politeness in conversation is an example of micro-level sociology. At the *micro*-level of analysis, the focus is on the social dynamics of intimate, face-to-face interactions. Research is conducted with a specific set of individuals such as conversational partners, family members, work associates, or friendship groups. In the conversation

study example, sociologists might try to determine how people from different cultures interpret each others' behaviour to see how different rules of politeness lead to misunderstandings. If the same misunderstandings occur consistently in a number of different interactions, the sociologists may be able to propose some generalizations about rules of politeness that would be helpful in reducing tensions in mixed-group dynamics (e.g., during staff meetings or international negotiations). Other examples of micro-level research include seeing how informal networks become a key source of support and advancement in formal bureaucracies, or how loyalty to criminal gangs is established.

Macro-level sociology focuses on the properties of large-scale, society-wide social interactions that extend beyond the immediate milieu of individual interactions: the dynamics of institutions, class structures, gender relations, or whole populations. The example above of the influence of migration on changing patterns of language usage is a macro-level phenomenon because it refers to structures or processes of social interaction that occur outside or beyond the intimate circle of individual social acquaintances. These include the economic, political, and other circumstances that lead to migration; the educational, media, and other communication structures that help or hinder the spread of speech patterns; the class, racial, or ethnic divisions that create different slangs or cultures of language use; the relative isolation or integration of different communities within a population; and so on. Other examples of macro-level research include examining why women are far less likely than men to reach positions of power in society, or why fundamentalist Christian religious movements play a more prominent role in American politics than they do in Canadian politics. In each case, the site of the analysis shifts away from the nuances and detail of micro-level interpersonal life to the broader, macro-level systematic patterns that structure social change and social cohesion in society.

In *global*-level sociology, the focus is on structures and processes that extend beyond the boundaries of states or specific societies. As Ulrich Beck (2000) has pointed out, in many respects we no longer "live and act in the self-enclosed spaces of national states and their respective national societies." Issues of climate change, the introduction of new technologies, the investment and disinvestment of capital, the images of popular culture, or the tensions of cross-cultural conflict, etc. increasingly involve our daily life in the affairs of the entire globe, by-passing traditional borders and, to some degree, distance itself. The example above of the way in which the world became divided into wealthy First World and impoverished Third World societies reflects social processes — the formation of international institutions such as the United Nations, the International Monetary Fund, and non-governmental organizations, for example — which are global in scale and global in their effects. With the boom and bust of petroleum or other export commodity economies, it is clear to someone living in Fort McMurray, Alberta, that their daily life is affected not only by their intimate relationships with the people around them, nor only by provincial and national based corporations and policies, etc., but by global markets that determine the price of oil and the global flows of capital investment. The *context* of these processes has to be analysed at a global scale of analysis.

The relationship between the micro, macro, and global remains one of the key conceptual problems confronting sociology. What is the relationship between an individual's life and social life? The early German sociologist Georg Simmel pointed out that macro-level processes are in fact nothing more than the sum of all the unique interactions between specific individuals at any one time (1908/1971), yet they have properties of their own which would be missed if sociologists only focused on the interactions of specific individuals. Émile Durkheim's classic study of suicide (1897/1951) is a case in point. While suicide is one of the most personal, individual, and intimate acts imaginable, Durkheim demonstrated that rates of suicide differed between religious communities — Protestants, Catholics, and Jews — in a way that could not be explained by the individual factors involved in each specific case. The different rates of suicide had to be explained by macro-level variables associated with the different religious beliefs and practices of the faith communities; more specifically, the different degrees of *social integration* of these communities. We will return to this example in more detail later. On the other hand, macro-level phenomena like class structures, institutional organizations, legal systems, gender stereotypes, population growth, and urban ways of life provide the shared context for everyday life but do not explain its specific nuances and micro-variations very well. Macro-level structures constrain the daily interactions of the intimate circles in which we move, but they are also filtered through localized perceptions and "lived" in a myriad of inventive and unpredictable ways.

The Sociological Imagination

Although the scale of sociological studies and the methods of carrying them out are different, the sociologists involved

in them all have something in common. Each of them looks at society using what pioneer sociologist C. Wright Mills (1916-1962) called the **sociological imagination**, sometimes also referred to as the "sociological lens" or "sociological perspective." In a sense, this was Mills' way of addressing the dilemmas of the macro/micro divide in sociology. Mills defined sociological imagination as how individuals understand their own and others' lives in relation to history and social structure (1959/2000). It is the capacity to see an individual's private troubles in the context of the broader social processes that structure them. This enables the sociologist to examine what Mills called "personal troubles of milieu" as "public issues of social structure," and vice versa.

Mills reasoned that private troubles like being overweight, being unemployed, having marital difficulties, or feeling purposeless or depressed can be purely personal in nature. It is possible for them to be addressed and understood in terms of personal, psychological, or moral attributes — either one's own or those of the people in one's immediate milieu. In an individualistic society like our own, this is in fact the most likely way that people will regard the issues they confront: "I have an addictive personality;" "I can't get a break in the job market;" "My husband is unsupportive," etc. However, if private troubles are widely shared with others, they indicate that there is a common social problem that has its source in the way social life is structured. At this level, the issues are not adequately understood as simply private troubles. They are best addressed as public issues that require a collective response to resolve.

Obesity, for example, has been increasingly recognized as a growing problem for both children and adults in North America. Michael Pollan cites statistics that three out of five Americans are overweight and one out of five is obese (2006). In Canada in 2012, just under one in five adults (18.4%) were obese, up from 16% of men and 14.5% of women in 2003 (Statistics Canada, 2013). Obesity is therefore not simply a private concern related to the medical issues, dietary practices, or exercise habits of specific individuals. It is a widely shared social issue that puts people at risk for chronic diseases like hypertension, diabetes, and cardiovascular disease. It also creates significant social costs for the medical system.

Pollan argues that obesity is in part a product of the increasingly sedentary and stressful lifestyle of modern, capitalist society. More importantly, however, it is a product of the industrialization of the food chain, which since the 1970s has produced increasingly cheap and abundant food with significantly more calories due to processing. Additives like corn syrup, which are much cheaper and therefore more profitable to produce than natural sugars, led to the trend of super-sized fast foods and soft drinks in the 1980s. As Pollan argues, trying to find a processed food in the supermarket without a cheap, calorie-rich, corn-based additive is a challenge. The sociological imagination in this example is the capacity to see the private troubles and attitudes associated with being overweight as an issue of how the industrialization of the food chain has altered the human/environment relationship — in particular, with respect to the types of food we eat and the way we eat them.

By looking at individuals and societies and how they interact through this lens, sociologists are able to examine what influences behaviour, attitudes, and culture. By applying systematic and scientific methods to this process, they try to do so without letting their own biases and preconceived ideas influence their conclusions.

Studying Patterns: How Sociologists View Society

All sociologists are interested in the experiences of individuals and how those experiences are shaped by interactions with social groups and society as a whole. To a sociologist, the personal decisions an individual makes do not exist in a vacuum. Cultural patterns and social forces put pressure on people to select one choice over another. Sociologists try to identify these general patterns by examining the behaviour of large groups of people living in the same society and experiencing the same societal pressures. When general patterns persist through time and become habitual or routinized at micro-levels of interaction, or institutionalized at macro or global levels of interaction, they are referred to as social **structures.**

As we noted above, understanding the relationship between the individual and society is one of the most difficult sociological problems. Partly this is because of the reified way these two terms are used in everyday speech. **Reification** refers to the way in which abstract concepts, complex processes, or mutable social relationships come to be thought of as "things." A prime example of reification is when people say that "society" caused an individual to do something, or to turn out in a particular way. In writing essays, first-year sociology students sometimes refer to "society" as a cause of social behaviour or as an entity with independent agency. On the other hand, the "individual" is a being that seems solid, tangible, and independent of anything going on outside of the skin sack that contains its essence. This conventional distinction between society and the individual is a product of reification, as both society and the individual appear as independent

objects. A *concept* of "the individual" and a *concept* of "society" have been given the status of real, substantial, independent objects. As we will see in the chapters to come, society and the individual are neither objects, nor are they independent of one another. An "individual" is inconceivable without the relationships to others that define their internal, subjective life and their external, socially-defined roles.

One problem for sociologists is that these concepts of the individual and society, and the relationship between them, are thought of in terms established by a very common *moral* framework in modern democratic societies — namely, that of individual responsibility and individual choice. The individual is morally responsible for their behaviours and decisions. Often in this framework, any suggestion that an individual's behaviour needs to be understood in terms of that person's social context is dismissed as "letting the individual off" for taking personal responsibility for their actions. Talking about society is akin to being morally soft or lenient.

Sociology, as a social science, remains neutral on these types of moral questions. For sociologists, the conceptualization of the individual and society is much more complex than the moral framework suggests and needs to be examined through evidence-based, rather than morality-based, research. The sociological problem is to be able to see the individual as a thoroughly social being and, yet, as a being who has agency and free choice. Individuals are beings who *do* take on individual responsibilities in their everyday social roles, and risk social consequences when they fail to live up to them. However, the manner in which individuals take on responsibilities, and sometimes the compulsion to do so, are socially defined. The sociological problem is to be able to see society as: a dimension of experience characterized by regular and predictable patterns of behaviour that exist independently of any specific individual's desires or self-understanding. At the same time, a society is nothing *but* the ongoing social relationships and activities of specific individuals.

A key basis of the sociological perspective is the concept that the individual and society are inseparable. It is impossible to study one without the other. German sociologist Norbert Elias (1887-1990) called the process of simultaneously analyzing the behaviour of individuals and the society that shapes that behaviour **figuration**. He described it through a metaphor of dancing. There can be no dance without the dancers, but there can be no dancers without the dance. Without the dancers, a dance is just an idea about motions in a choreographer's head. Without a dance, there is just a group of people moving around a floor. Similarly, there is no society without the individuals that make it up, and there are also no individuals who are not affected by the society in which they live (Elias, 1978).

Making Connections: Sociology in the Real World

The Individual in Society: Choices of Aboriginal Gang Members



Figure 1.4. "Native Pride" (photo courtesy of Rap Dictionary at http://62.193.220.29/Native_syndicate)

In 2010 the CBC program *The Current* aired a report about several young Aboriginal men who were serving time in prison in Saskatchewan for gang-related activities (CBC, 2010). They all expressed desires to be able to deal with their drug addiction issues, return to their families, and assume their responsibilities when their sentences were complete. They wanted to have their own places with nice things in them. However, according to the CBC report, 80% of the

prison population in the Saskatchewan Correctional Centre were Aboriginal and 20% of those were gang members. This is consistent with national statistics on Aboriginal incarceration which showed that in 2010–2011, the Aboriginal incarceration rate was 10 times higher than for the non-Aboriginal population. While Aboriginal people account for about 4% of the Canadian population, in 2013 they made up 23.2% of the federal penitentiary population. In 2001 they made up only 17% of the penitentiary population. Aboriginal overrepresentation in prisons has continued to grow substantially (Office of the Correctional Investigator, 2013). The outcomes of Aboriginal incarceration are also bleak. The federal Office of the Correctional Investigator summarized the situation as follows. Aboriginal inmates are:

- Routinely classified as higher risk and higher need in categories such as employment, community reintegration, and family supports.
- Released later in their sentence (lower parole grant rates); most leave prison at Statutory Release or Warrant Expiry dates.
- Overrepresented in segregation and maximum security populations.
- Disproportionately involved in use-of-force interventions and incidents of prison self-injury.
- More likely to return to prison on revocation of parole, often for administrative reasons, not criminal violations (2013).

The federal report notes that "the high rate of incarceration for Aboriginal peoples has been linked to systemic discrimination and attitudes based on racial or cultural prejudice, as well as economic and social disadvantage, substance abuse, and intergenerational loss, violence and trauma" (2013).

This is clearly a case in which the situation of the incarcerated inmates interviewed on the CBC program has been structured by historical social patterns and power relationships that confront Aboriginal people in Canada generally. How do we understand it at the individual level, however — at the level of personal decision making and individual responsibilities? One young inmate described how, at the age of 13, he began to hang around with his cousins who were part of a gang. He had not grown up with "the best life"; he had family members suffering from addiction issues and traumas. The appeal of what appeared as a fast and exciting lifestyle — the sense of freedom and of being able to make one's own life, instead of enduring poverty — was compelling. He began to earn money by "running dope" but also began to develop addictions. He was expelled from school for recruiting gang members. The only job he ever had was selling drugs. The circumstances in which he and the other inmates had entered the gang life, and the difficulties getting out of it they knew awaited them when they left prison, reflect a set of decision-making parameters fundamentally different than those facing most non-Aboriginal people in Canada.

1.2. The History of Sociology



Figure 1.5. People have been thinking like sociologists long before sociology became a separate academic discipline: (a) Plato and Aristotle, (b) Confucius, (c) Khaldun, and (d) Voltaire all set the stage for modern sociology. (Photos (a),(b),(c),(d) courtesy of Wikimedia Commons).

Since ancient times, people have been fascinated by the relationship between individuals and the societies to which they belong. The ancient Greeks might be said to have provided the foundations of sociology through the distinction they drew

between *physis* (nature) and *nomos* (law or custom). Whereas nature or *physis* for the Greeks was "what emerges from itself" without human intervention, *nomos* in the form of laws or customs, were human conventions designed to constrain human behaviour. The modern sociological term *"norm"* (i.e., a social rule that regulates human behaviour) comes from the Greek term *nomos. Histories* by Herodotus (484–425 BCE) was a proto-anthropological work that described the great variations in the *nomos* of different ancient societies around the Mediterranean, indicating that human social life was not a product of nature but a product of human creation. If human social life was the product of an invariable human or biological nature, all cultures would be the same. The concerns of the later Greek philosophers — Socrates (469–399 BCE), Plato (428–347 BCE), and Aristotle (384–322 BCE) — with the ideal form of human community (the *polis* or city-state) can be derived from the ethical dilemmas of this difference between human nature and human norms. The ideal community might be rational but it was not natural.

In the 13th century, Ma Tuan-Lin, a Chinese historian, first recognized social dynamics as an underlying component of historical development in his seminal encyclopedia, *General Study of Literary Remains*. The study charted the historical development of Chinese state administration from antiquity in a manner very similar to contemporary institutional analyses. The next century saw the emergence of the historian some consider to be the world's first sociologist, the Berber scholar Ibn Khaldun (1332–1406) of Tunisia. His *Muqaddimah: An Introduction to History* is known for going beyond descriptive history to an analysis of historical processes of change based on his insights into "the nature of things which are born of civilization" (Khaldun quoted in Becker and Barnes, 1961). Key to his analysis was the distinction between the sedentary life of cities and the nomadic life of pastoral peoples like the Bedouin and Berbers. The nomads, who exist independent of external authority, developed a social bond based on *blood lineage* and "*esprit de corps" ('Asabijja)*, which enabled them to mobilize quickly and act in a unified and concerted manner in response to the rugged circumstances of desert life. The sedentaries of the city entered into a different cycle in which esprit de corps is subsumed to institutional power and the intrigues of political factions. The need to be focused on subsistence is replaced by a trend toward increasing luxury, ease, and refinements of taste. The relationship between the two poles of existence, nomadism and sedentary life, was at the basis of the development and decay of civilizations (Becker and Barnes, 1961).

However, it was not until the 19th century that the basis of the modern discipline of sociology can be said to have been truly established. The impetus for the ideas that culminated in sociology can be found in the three major transformations that defined modern society and the culture of modernity: the development of modern science from the 16th century onward, the emergence of democratic forms of government with the American and French Revolutions (1775–1783 and 1789–1799 respectively), and the Industrial Revolution beginning in the 18th century. Not only was the framework for sociological knowledge established in these events, but also the initial motivation for creating a science of society. Early sociologists like Comte and Marx sought to formulate a rational, evidence-based response to the experience of massive social dislocation brought about by the transition from the European feudal era to capitalism. This was a period of unprecedented social problems, from the breakdown of local communities to the hyper-exploitation of industrial labourers. Whether the intention was to restore order to the chaotic disintegration of society, as in Comte's case, or to provide the basis for a revolutionary transformation in Marx's, a rational and scientifically comprehensive knowledge of society and its processes was required. It was in this context that "society" itself, in the modern sense of the word, became visible as a phenomenon to early investigators of the social condition.

The development of modern science provided the model of knowledge needed for sociology to move beyond earlier moral, philosophical, and religious types of reflection on the human condition. Key to the development of science was the technological mindset that Max Weber termed the **disenchantment of the world**: "principally there are no mysterious incalculable forces that come into play, but rather one can, in principle, master all things by calculation" (1919). The focus of knowledge shifted from intuiting the intentions of spirits and gods to systematically observing and testing the world of things through science and technology. Modern science abandoned the medieval view of the world in which God, "the unmoved mover," defined the natural and social world as a changeless, cyclical creation ordered and given purpose by divine will. Instead modern science combined two philosophical traditions that had historically been at odds: Plato's **rationalism** and Aristotle's **empiricism** (Berman, 1981). Rationalism sought the laws that governed the truth of reason and ideas, and in the hands of early scientists like Galileo and Newton, found its highest form of expression in the logical formulations of mathematics. Empiricism sought to discover the laws of the operation of the world through the



Figure 1.6. Newton, William Blake, (1795). (Photo courtesy of William Blake/ Wikimedia Commons)

careful, methodical, and detailed observation of the world. The new scientific worldview therefore combined the clear and logically coherent, conceptual formulation of propositions from rationalism, with an empirical method of inquiry based on observation through the senses. Sociology adopted these core principles to emphasize that claims about social life had to be clearly formulated and based on evidence-based procedures. It also gave sociology a technological cast as a type of knowledge which could be used to solve social problems.

The emergence of democratic forms of government in the 18th century demonstrated that humans had the capacity to change the world. The rigid hierarchy of medieval society was not a God-given eternal order, but a human order that could be challenged and improved upon through human intervention. Through the revolutionary process of democratization, society came to be seen as both *historical* and the *product of human endeavours.* Age of Enlightenment philosophers like Locke, Voltaire, Montaigne, and Rousseau developed general principles that could be used to explain social life. Their emphasis shifted from the histories and exploits of the aristocracy to the life of ordinary people. Mary Wollstonecraft's *A Vindication of the Rights of Women* (1792) extended the critical analysis of her male Enlightenment contemporaries to the situation of women. Significantly for modern sociology they proposed that the use of reason could be applied to address social ills and to emancipate humanity from servitude. Wollstonecraft for example argued that simply allowing women to have a proper education would enable them to contribute to the improvement of society, especially through their influence on children. On the other hand, the bloody experience of the democratic revolutions, particularly the French Revolution, which resulted in the "Reign of Terror" and ultimately Napoleon's attempt to subjugate Europe, also provided a cautionary tale for the early sociologists about the need for the sober scientific assessment of society to address social problems.

The Industrial Revolution in a strict sense refers to the development of industrial methods of production, the introduction of industrial machinery, and the organization of labour to serve new manufacturing systems. These economic changes emblemize the massive transformation of human life brought about by the creation of wage labour, capitalist competition, increased mobility, urbanization, individualism, and all the social problems they wrought: poverty, exploitation, dangerous working conditions, crime, filth, disease, and the loss of family and other traditional support networks, etc. It was a time of great social and political upheaval with the rise of empires that exposed many people — for the first time — to societies and cultures other than their own. Millions of people were moving into cities and many people were turning away from their traditional religious beliefs. Wars, strikes, revolts, and revolutionary actions were reactions to underlying social tensions that had never existed before and called for critical examination. August Comte in particular envisioned the new science of sociology as the antidote to conditions that he described as "moral anarchy."

Sociology therefore emerged; firstly, as an extension of the new worldview of science; secondly, as a part of the

Enlightenment project and its focus on historical change, social injustice, and the possibilities of social reform; and thirdly, as a crucial response to the new and unprecedented types of social problems that appeared in the 19th century with the Industrial Revolution. It did not emerge as a unified science, however, as its founders brought distinctly different perspectives to its early formulations.

August Comte: The Father of Sociology

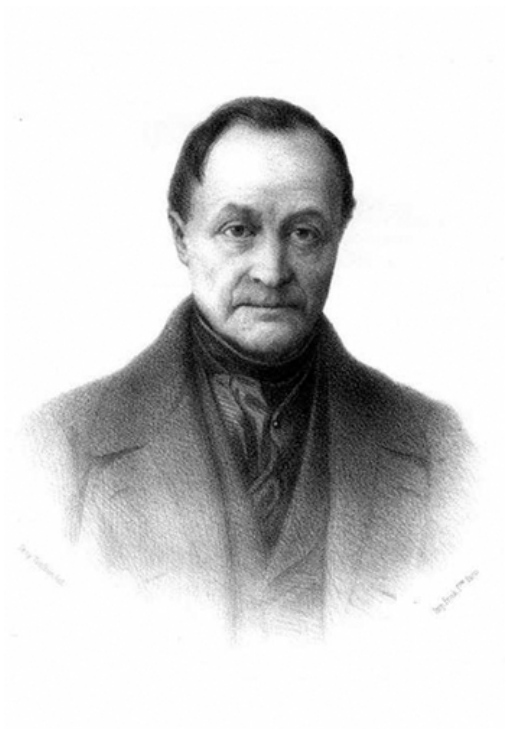


Figure 1.7. Auguste Comte is considered by many to be the father of sociology. (Photo courtesy of Wikimedia Commons)

The term sociology was first coined in 1780 by the French essayist Emmanuel-Joseph Sieyès (1748–1836) in an unpublished manuscript (Fauré et al., 1999). In 1838, the term was reinvented by Auguste Comte (1798–1857). The contradictions of Comte's life and the times he lived through can be in large part read into the concerns that led to his development of sociology. He was born in 1798, year 6 of the new French Republic, to staunch monarchist and Catholic parents. They lived comfortably off his father's earnings as a minor bureaucrat in the tax office. Comte originally studied to be an engineer, but after rejecting his parents' conservative, monarchist views, he declared himself a republican and free spirit at the age of 13 and was eventually kicked out of school at 18 for leading a school riot. This ended his chances of getting a formal education and a position as an academic or government official.

He became a secretary to the utopian socialist philosopher Henri de Saint-Simon (1760–1825) until they had a falling out in 1824 (after St. Simon reputedly purloined some of Comte's essays and signed his own name to them). Nevertheless, they both thought that society could be studied using the same scientific methods utilized in the natural sciences. Comte also believed in the potential of social scientists to work toward the betterment of society and coined the slogan "order and progress" to reconcile the opposing progressive and conservative factions that had divided the crisis-ridden, post-revolutionary French society. Comte proposed a renewed, organic spiritual order in which the authority of science would be the means to create a rational social order. Through science, each social strata would be reconciled with their place in a hierarchical social order. It is a testament to his influence in the 19th century that the phrase "order and progress" adorns the Brazilian coat of arms (Collins and Makowsky, 1989).

Comte named the scientific study of social patterns **positivism**. He described his philosophy in a well-attended and popular series of lectures, which he published as *The Course in Positive Philosophy* (1830–1842) and *A General View of*

Positivism (1848/1977). He believed that using scientific methods to reveal the laws by which societies and individuals interact would usher in a new "positivist" age of history. In principle, positivism, or what Comte called "social physics," proposed that the study of society could be conducted in the same way that the natural sciences approach the natural world.

While Comte never in fact conducted any social research, his notion of sociology as a positivist science that might effectively socially engineer a better society was deeply influential. Where his influence waned was a result of the way in which he became increasingly obsessive and hostile to all criticism as his ideas progressed beyond positivism as the "science of society" to positivism as the basis of a new cult-like, technocratic "religion of humanity." The new social order he imagined was deeply conservative and hierarchical, a kind of a caste system with every level of society obliged to reconcile itself with its "scientifically" allotted place. Comte imagined himself at the pinnacle of society, taking the title of "Great Priest of Humanity." The moral and intellectual anarchy he decried would be resolved through the rule of sociologists who would eliminate the need for unnecessary and divisive democratic dialogue. Social order "must ever be incompatible with a perpetual discussion of the foundations of society" (Comte, 1830/1975).

Karl Marx: The Ruthless Critique of Everything Existing

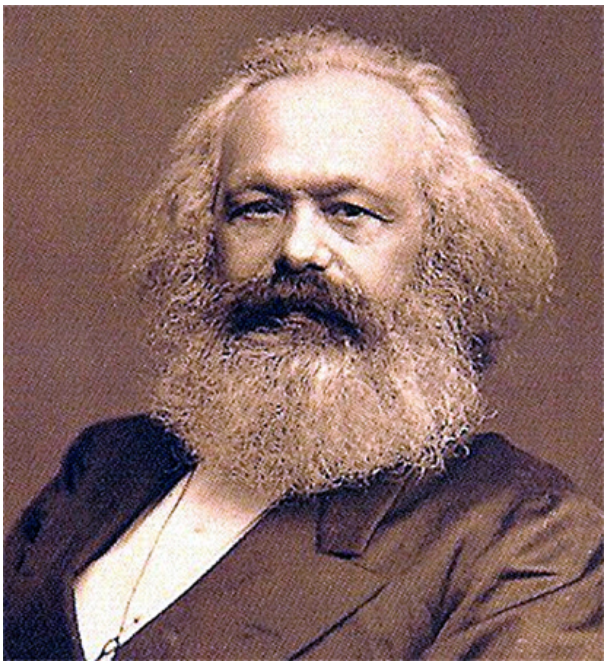


Figure 1.8. Karl Marx was one of the founders of sociology. His ideas about social conflict are still relevant today. (Photo courtesy of John Mayall/Wikimedia Commons)

Karl Marx (1818–1883) was a German philosopher and economist. In 1848 he and Friedrich Engels (1820–1895) co-authored the *Communist Manifesto*. This book is one of the most influential political manuscripts in history. It also presents in a highly condensed form Marx's theory of society, which differed from what Comte proposed. Whereas Comte viewed the goal of sociology as recreating a unified, post-feudal *spiritual* order that would help to institutionalize a new era of political and social stability, Marx developed a critical analysis of capitalism that saw the *material* or *economic* basis of inequality and power relations as the cause of social instability and conflict. The focus of sociology, or what Marx called **historical materialism** (the "materialist conception of history"), should be the "ruthless critique of everything existing," as he said in a letter to his friend Arnold Ruge (1802-1880). In this way the goal of sociology would not simply be to scientifically analyze or objectively describe society, but to use a rigorous scientific analysis as a basis to change it. This framework became the foundation of contemporary **critical sociology**.

Although Marx did not call his analysis "sociology," his sociological innovation was to provide a *social* analysis of the *economic* system. Whereas Adam Smith (1723–1790) and the political economists of the 19th century tried to explain the economic laws of supply and demand solely as a market mechanism (similar to the abstract discussions of stock market

indices and investment returns in the business pages of newspapers today), Marx's analysis showed the *social relationships* that had created the market system, and the *social repercussions* of their operation. As such, his analysis of modern society was not static or simply descriptive. He was able to put his finger on the underlying dynamism and continuous change that characterized capitalist society.

Marx was also able to create an effective basis for critical sociology in that what he aimed for in his analysis was, as he put it in another letter to Arnold Ruge, "the self-clarification of the struggles and wishes of the age." While he took a clear and principled value position in his critique, he did not do so dogmatically, based on an arbitrary moral position of what he personally thought was good and bad. He felt, rather, that a critical social theory must engage in clarifying and supporting the issues of social justice that were inherent within the existing struggles and wishes of the age. In his own work, he endeavoured to show how the variety of specific work actions, strikes, and revolts by workers in different occupations — for better pay, safer working conditions, shorter hours, the right to unionize, etc. — contained the seeds for a vision of universal equality, collective justice, and ultimately the ideal of a classless society.

Harriet Martineau: The First Woman Sociologist?



Figure 1.9. Harriet Martineau. (Photo courtesy of Wikimedia Commons)

Harriet Martineau (1802–1876) was one of the first women sociologists in the 19th century. There are a number of other women who might compete with her for the title of the *first* woman sociologist, such as Catherine Macaulay, Mary Wollstonecraft, Flora Tristan, and Beatrice Webb, but Martineau's specifically sociological credentials are strong. She was for a long time known principally for her English translation of Comte's *Course in Positive Philosophy.* Through this popular translation she introduced the concept of sociology as a methodologically rigorous discipline to an English-speaking audience. But she also created a body of her own work in the tradition of the great **social reform** movements of the 19th century, and introduced a sorely missing woman's perspective into the discourse on society.

It was a testament to her abilities that after she became impoverished at the age of 24 with the death of her father, brother, and fiancé, she was able to earn her own income as the first woman journalist in Britain to write under her own name. From the age of 12, she suffered from severe hearing loss and was obliged to use a large ear trumpet to converse. She impressed a wide audience with a series of articles on political economy in 1832. In 1834 she left England to engage in two years of study of the new republic of the United States and its emerging institutions: prisons, insane asylums,

factories, farms, Southern plantations, universities, hospitals, and churches. On the basis of extensive research, interviews, and observations, she published *Society in America* and worked with abolitionists on the social reform of slavery (Zeitlin, 1997). She also worked for social reform in the situation of women: the right to vote, have an education, pursue an occupation, and enjoy the same legal rights as men. Together with Florence Nightingale, she worked on the development of public health care, which led to early formulations of the welfare system in Britain (McDonald, 1998).

Émile Durkheim: The Pathologies of the Social Order



Figure 1.10. Émile Durkheim. (Photo courtesy of Wikimedia Commons)

Émile Durkheim (1858–1917) helped establish sociology as a formal academic discipline by establishing the first European department of sociology at the University of Bordeaux in 1895, and by publishing his *Rules of the Sociological Method* in 1895. He was born to a Jewish family in the Lorraine province of France (one of the two provinces, along with Alsace, that were lost to the Germans in the Franco-Prussian War of 1870–1871). With the German occupation of Lorraine, the Jewish community suddenly became subject to sporadic anti-Semitic violence, with the Jews often being blamed for the French defeat and the economic/political instability that followed. Durkheim attributed this strange experience of anti-Semitism and scapegoating to the lack of moral purpose in modern society.

As in Comte's time, France in the late 19th century was the site of major upheavals and sharp political divisions: the loss of the Franco-Prussian War, the Paris Commune (1871) in which 20,000 workers died, the fall and capture of Emperor Napoleon III (Napoleon I's nephew), the creation of the Third Republic, and the Dreyfus Affair. This undoubtedly led to the focus in Durkheim's sociology on themes of moral anarchy, decadence, disunity, and disorganization. For Durkheim, sociology was a scientific but also a "moral calling" and one of the central tasks of the sociologist was to determine "the causes of the general temporary maladjustment being undergone by European societies and remedies which may relieve it" (1897/1951). In this respect, Durkheim represented the sociologist as a kind of medical doctor, studying *social* pathologies of the moral order and proposing social remedies and cures. He saw healthy societies as stable, while pathological societies experienced a breakdown in social norms between individuals and society. He described this breakdown as a state of normlessness or **anomie —** a lack of norms that give clear direction and purpose to individual actions. As he put it, anomie was the result of "society's insufficient presence in individuals" (1897/1951).

Key to Durkheim's approach was the development of a framework for sociology based on the analysis of **social facts** and social **functions.** Social facts are those things like law, custom, morality, religious rites, language, money, business practices, etc. that are defined *externally* to the individual. Social facts:

- Precede the individual and will continue to exist after she or he is gone;
- Consist of details and obligations of which individuals are frequently unaware; and
- Are endowed with an external coercive power by reason of which individuals are controlled.

For Durkheim, social facts were like the facts of the natural sciences. They could be studied without reference to the subjective experience of individuals. He argued that "social facts must be studied as things, that is, as realities external to the individual" (Durkheim, 1895/1964). Individuals experience them as obligations, duties, and restraints on their behaviour, operating independently of their will. They are hardly noticeable when individuals consent to them but provoke reaction when individuals resist.

Durkheim argued that each of these social facts serve one or more *functions* within a society. They exist to fulfill a societal need. For example, one function of a society's laws may be to protect society from violence and punish criminal behaviour, while another is to create collective standards of behaviour that people believe in and identify with. Laws create a basis for **social solidarity** and order. In this manner, each identifiable social fact could be analyzed with regard to its specific function in a society. Like a body in which each organ (heart, liver, brain, etc.) serves a particular function in maintaining the body's life processes, a healthy society depends on particular functions or needs being met. Durkheim's insights into society often revealed that social practices, like the worshipping of totem animals in his study of Australian Aboriginal religions, had social functions quite at variance with what practitioners consciously believed they were doing. The honouring of totemic animals through rites and privations functioned to create social solidarity and cohesion for tribes whose lives were otherwise dispersed through the activities of hunting and gathering in a sparse environment.

Making Connections: Sociology in the Real World

Durkheim and the Sociological Study of Suicide



Figure 1.11. The chalice is at the center of Catholic religious ritual and practice. In what way is it an example of a social fact? How does it function to bind the community of the faithful? (Photo courtesy of Mary Harrsch/Flickr)

Durkheim was very influential in defining the subject matter of the new discipline of sociology. For Durkheim, sociology was not about just any phenomena to do with the life of human beings, but only those phenomena which

pertained exclusively to a *social level* of analysis. It was not about the biological or psychological dynamics of human life, for example, but about the external *social facts* through which the lives of individuals were constrained. Moreover, the dimension of human experience described by social facts had to be explained in its own terms. It could not be explained by biological drives or psychological characteristics of individuals. It was a dimension of reality *sui generis* (of its own kind, unique in its characteristics). It could not be explained by, or reduced to, its individual components without missing its most important features. As Durkheim put it, "a social fact can only be explained by another social fact" (Durkheim, 1895/1964).

This is the framework of Durkheim's famous study of suicide. In *Suicide: A Study in Sociology* (1897/1997), Durkheim attempted to demonstrate the effectiveness of his rules of social research by examining suicide statistics in different police districts. Suicide is perhaps the most personal and most individual of all acts. Its motives would seem to be absolutely unique to the individual and to individual psychopathology. However, what Durkheim observed was that statistical rates of suicide remained fairly constant, year by year and region by region. Moreover, there was no correlation between rates of suicide and rates of psychopathology. Suicide rates did vary, however, according to the social context of the suicides. For example, suicide rates varied according to the religious affiliation of suicides. Protestants had higher rates of suicide than Catholics, even though both religions equally condemn suicide. In some jurisdictions Protestants killed themselves 300% more often than Catholics. Durkheim argued that the key factor that explained the difference in suicide *rates* (i.e., the statistical rates, not the purely individual motives for the suicides) were the different degrees of *social integration* of the different religious communities, measured by the degree of authority religious beliefs hold over individuals, and the amount of collective ritual observance and mutual involvement individuals engage in in religious practice. A social fact — suicide rates — was explained by another social fact — degree of social integration.

The key social function of religion was to integrate individuals by linking them to a common external doctrine and to a greater spiritual reality outside of themselves. Religion created moral communities. In this regard, he observed that the degree of authority that religious beliefs held over Catholics was much stronger than for Protestants, who from the time of Luther had been taught to take a critical attitude toward formal doctrine. Protestants were more free to interpret religious belief and in a sense were were more individually responsible for supervising and maintaining their own religious practice. Moreover, in Catholicism the ritual practice of the sacraments, such as confession and taking communion, remained intact, whereas in Protestantism ritual was reduced to a minimum. Participation in the choreographed rituals of religious life created a highly visible, public focus for religious observance, forging a link between private thought and public belief. Because Protestants had to be more individualistic and self-reliant in their religious practice, they were not subject to the strict discipline and external constraints of Catholics. They were less integrated into their communities and more thrown back on their own resources. They were more prone to what Durkheim termed **egoistic suicide**: suicide which results from the individual ego having to depend on itself for self-regulation (and failing) in the absence of strong social bonds tying it to a community.

Durkheim's study was unique and insightful because he did not try to explain suicide rates in terms of individual psychopathology. Instead, he regarded the regularity of the suicide rates as a social fact, implying "the existence of collective tendencies exterior to the individual" (Durkheim, 1897/1997), and explained their variation with respect to another social fact: social integration. He wrote, "Suicide varies inversely with the degree of integration of the social groups of which the individual forms a part" (Durkheim, 1897/1997).

Contemporary research into suicide in Canada shows that suicide is the second leading cause of death among young people aged 15 to 34 (behind death by accident) (Navaneelan, 2012). The greatest increase in suicide since the 1960s has been in the age 15-19 age group, increasing by 4.5 times for males and by 3 times for females. In 2009, 23% of deaths among adolescents aged 15-19 were caused by suicide, up from 9% in 1974, (although this difference in percentage is because the rate of suicide remained fairly constant between 1974 and 2009, while death due to accidental causes has declined markedly). On the other hand, married people are the least likely group to commit suicide. Single, never-married people are 3.3 times more likely to commit suicide than married people, followed by widowed and divorced individuals respectively. How do sociologists explain this?

It is clear that adolescence and early adulthood is a period in which social ties to family and society are strained. It is

often a confusing period in which teenagers break away from their childhood roles in the family group and establish their independence. Youth unemployment is higher than for other age groups and, since the 1960s, there has been a large increase in divorces and single parent families. These factors tend to decrease the quantity and the intensity of ties to society. Married people on the other hand have both strong affective affinities with their marriage partners and strong social expectations placed on them, especially if they have families: their roles are clear and the norms which guide them are well-defined. According to Durkheim's proposition, suicide rates vary inversely with the degree of integration of social groups. Adolescents are less integrated into society, which puts them at a higher risk for suicide than married people who are more integrated. It is interesting that the highest rates of suicide in Canada are for adults in midlife, aged 40-59. Midlife is also a time noted for crises of identity, but perhaps more significantly, as Navaneelan (2012) argues, suicide in this age group results from the change in marital status as people try to cope with the transition from married to divorced and widowed.

Max Weber: Verstehende Soziologie



Figure 1.12. Max Weber. (Photo courtesy of Wikimedia Commons)

Prominent sociologist Max Weber (1864–1920) established a sociology department in Germany at the Ludwig Maximilians University of Munich in 1919. Weber wrote on many topics related to sociology including political change in Russia, the condition of German farm workers, and the history of world religions. He was also a prominent public figure, playing an important role in the German peace delegation in Versailles and in drafting the ill-fated German (Weimar) constitution following the defeat of Germany in World War I.

Weber also made a major contribution to the methodology of sociological research. Along with the philosophers Wilhelm Dilthey (1833–1911) and Heinrich Rickert (1863–1936), Weber believed that it was difficult if not impossible to apply natural science methods to accurately predict the behaviour of groups as positivist sociology hoped to do. They argued that the influence of culture on human behaviour had to be taken into account. What was distinct about human behaviour was that it is essentially *meaningful.* Human behaviour could not be understood independently of the meanings that individuals attributed to it. A Martian's analysis of the activities in a skateboard park would be hopelessly confused unless it *understood* that the skateboarders were motivated by the excitement of taking risks and the pleasure in developing skills. This insight into the meaningful nature of human behaviour even applied to the sociologists themselves, who, they believed, should be aware of how their own cultural biases could influence their research. To deal with this problem, Weber and Dilthey introduced the concept of ***Verstehen***, a German word that means to understand from a subject's point of view. In seeking *Verstehen*, outside observers of a social world — an entire culture or a small setting — attempt to understand it empathetically from an insider's point of view.

In his essay "The Methodological Foundations of Sociology," Weber described sociology as "a science which attempts the interpretive understanding of social action in order to arrive at a causal explanation of its course and effects" (Weber,

1922). In this way he delimited the field that sociology studies in a manner almost opposite to that of Émile Durkheim. Rather than defining sociology as the study of the unique dimension of external *social facts,* sociology was concerned with **social action**: actions to which individuals attach *subjective* meanings. "Action is social in so far as, by virtue of the subjective meaning attached to it by the acting individual (or individuals), it takes account of the behaviour of others and is thereby oriented in its course" (Weber, 1922). The actions of the young skateboarders can be explained because they hold the experienced boarders in esteem and attempt to emulate their skills, even if it means scraping their bodies on hard concrete from time to time. Weber and other like-minded sociologists founded **interpretive sociology** whereby social researchers strive to find systematic means to interpret and describe the subjective meanings behind social processes, cultural norms, and societal values. This approach led to research methods like ethnography, participant observation, and phenomenological analysis. Their aim was not to generalize or predict (as in positivistic social science), but to systematically gain an in-depth understanding of social worlds. The natural sciences may be precise, but from the interpretive sociology point of view their methods confine them to study only the external characteristics of things.

Georg Simmel: A Sociology of Forms



Figure 1.13. Georg Simmel. (Photo courtesy of Julius Cornelius Schaarwächter/Wikimedia Commons)

Georg Simmel (1858–1918) was one of the founding fathers of sociology, although his place in the discipline is not always recognized. In part, this oversight may be explained by the fact that Simmel was a Jewish scholar in Germany at the turn of 20th century and, until 1914, he was unable to attain a proper position as a professor due to anti-Semitism. Despite the brilliance of his sociological insights, the quantity of his publications, and the popularity of his public lectures as *Privatdozent* at the University of Berlin, his lack of a regular academic position prevented him from having the kind of student following that would create a legacy around his ideas. It might also be explained by some of the unconventional and varied topics that he wrote on: the structure of flirting, the sociology of adventure, the importance of secrecy, the patterns of fashion, the social significance of money, etc. He was generally seen at the time as not having a systematic or integrated theory of society. However, his insights into how social *forms* emerge at the micro-level of interaction and how they relate to macro-level phenomena remain valuable in contemporary sociology.

Simmel's sociology focused on the key question, "How is society possible?" His answer led him to develop what he

called **formal sociology**, or the sociology of social forms. In his essay "The Problem of Sociology," Simmel reaches a strange conclusion for a sociologist: "There is no such thing as society 'as such.'" "Society" is just the name we give to the "extraordinary multitude and variety of interactions [that] operate at any one moment" (Simmel, 1908/1971). This is a basic insight of micro-sociology. However useful it is to talk about macro-level phenomena like capitalism, the moral order, or **rationalization**, in the end what these phenomena refer to is a multitude of *ongoing, unfinished processes of interaction between specific individuals*. Nevertheless, the phenomena of social life do have recognizable forms, and the forms do guide the behaviour of individuals in a regularized way. A bureaucracy is a form of social interaction that persists from day to day. One does not come into work one morning to discover that the rules, job descriptions, paperwork, and hierarchical order of the bureaucracy have disappeared. Simmel's questions were: How do the forms of social life persist? How did they emerge in the first place? What happens when they get fixed and permanent?

Simmel's focus on how social forms emerge became very important for micro-sociology, symbolic interactionism, and the studies of hotel lobbies, cigarette girls, and street-corner societies, etc. popularized by the Chicago School in the mid-20th century. His analysis of the creation of new social forms was particularly tuned in to capturing the fragmentary everyday experience of modern social life that was bound up with the unprecedented nature and scale of the modern city. In his lifetime, the city of Berlin where he lived and taught for most of his career expanded massively after the unification of Germany in the 1870s and, by 1900, became a major European metropolis of 4 million people. The development of a metropolis created a fundamentally new human experience. The inventiveness of people in creating new forms of interaction in response became a rich source of sociological investigation.

1.3. Theoretical Perspectives



Figure 1.14. People holding posters and waving flags at a protest rally. (Photo courtesy of Steve Herman/Wikimedia Commons)

Sociologists study social events, interactions, and patterns. They then develop theories to explain why these occur and what can result from them. In sociology, a **theory** is a way to explain different aspects of social interactions and create testable propositions about society (Allan, 2006). For example, Durkheim's proposition, that differences in suicide rate can be explained by differences in the degree of social integration in different communities, is a theory.

As this brief survey of the history of sociology suggests, there is considerable diversity in the theoretical approaches sociology takes to studying society. Sociology is a **multi-perspectival science**: a number of distinct perspectives or *paradigms* offer competing explanations of social phenomena. **Paradigms** are philosophical and theoretical frameworks used within a discipline to formulate theories, generalizations, and the research performed in support of them. They refer to the underlying organizing principles that tie different constellations of concepts, theories, and ways of formulating

problems together (Drengson, 1983). Talcott Parsons' reformulation of Durkheim's and others work as **structural functionalism** in the 1950s is an example of a paradigm because it provided a general model of analysis suited to an unlimited number of research topics. Parsons proposed that any identifiable social structure (e.g., roles, families, religions, or states) could be explained by the particular function it performed in maintaining the operation of society as a whole. **Critical sociology** and **symbolic interactionism** are two other sociological paradigms which formulate the explanatory framework and research problem differently.

The variety of paradigms and methodologies makes for a rich and useful dialogue among sociologists. It is also sometimes confusing for students who expect that sociology will have a unitary scientific approach like that of the natural sciences. However, the key point is that the subject matter of sociology is fundamentally different from that of the natural sciences. The existence of multiple approaches to the topic of society and social relationships makes sense given the nature of the subject matter of sociology. The "contents" of a society are never simply a set of objective qualities like the chemical composition of gases or the forces operating on celestial spheres. For the purposes of analysis, the contents of society can sometimes be viewed in this way, as in the positivist perspective, but in reality, they are imbued with social meanings, historical contexts, political struggles, and human agency.



Figure 1.15. The South Asian fable of the blind men and the elephant from the poem by John Godfrey Saxe. The inquisitive blind men want to know what an elephant is. The first one feels the elephant's flank and says, "the elephant is very like a wall!" The second one feels the elephant's tusk and says, "an elephant is very like a spear!" The third one feels the elephant's trunk and says, "the elephant is very like a snake!" (Illustrations courtesy of Mlke Kline/Flickr)

This makes social life a complex, moving target for researchers to study, and the outcome of the research will be different depending on where and with what assumptions the researcher begins. Even the elementary division of experience into an interior world, which is "subjective," and an exterior world, which is "objective," varies historically, cross-culturally, and sometimes moment by moment in an individual's life. From the phenomenological perspective in sociology, this elementary division, which forms the starting point and basis of the "hard" or "objective" sciences, is in fact usefully understood as a social accomplishment sustained through social interactions. We actively divide the flow of impressions through our consciousness into socially recognized categories of subjective and objective, and we do so by learning and following social norms and rules. The division between subjective impressions and objective facts is natural and necessary only in the sense that it has become what Schutz (1962) called the "natural attitude" for people in modern society. Therefore, this division performs an integral function in organizing modern social and institutional life on an ongoing basis. We assume that the others we interact with view the world through the natural attitude. Confusion ensues when we or they do not. Other forms of society have been based on different modes of being in the world.

Despite the differences that divide sociology into multiple perspectives and methodologies, its unifying aspect is the systematic and rigorous nature of its social inquiry. If the distinction between "soft" and "hard" sciences is useful at all, it refers to the degree of rigour and systematic observation involved in the conduct of research rather than the division between the social and the natural sciences *per se*. Sociology is based on the scientific research tradition which emphasizes two key components: empirical observation and the logical construction of theories and propositions. **Science** is understood here in the broad sense to mean the use of reasoned argument, the ability to see general patterns in particular incidences, and the reliance on evidence from systematic observation of social reality. However, as noted above, the outcome of sociological research will differ depending on the initial assumptions or perspective of the researcher. Each of

the blind men studying the elephant in the illustration above are capable of producing an empirically true and logically consistent account of the elephant, albeit limited, which will differ from the accounts produced by the others. While the analogy that society is like an elephant is tenuous at best, it does exemplify the way that different schools of sociology can explain the same factual reality in different ways

Within this general scientific framework, therefore, sociology is broken into the same divisions that separate the forms of modern knowledge more generally. As Jürgen Habermas (1972) describes, by the time of the Enlightenment in the 18th century, the unified perspective of Christendom had broken into three distinct spheres of knowledge: the natural sciences, hermeneutics (or the interpretive sciences like literature, philosophy, and history), and critique. In many ways the three spheres of knowledge are at odds with one another, but each serves an important human interest or purpose. The natural sciences are oriented to developing a technical knowledge useful for controlling and manipulating the natural world to serve human needs. Hermeneutics is oriented to developing a humanistic knowledge useful for determining the meaning of texts, ideas, and human practices in order to create the conditions for greater mutual understanding. Critique is oriented to developing practical knowledge and forms of collective action that are useful for challenging entrenched power relations in order to enable human emancipation and freedoms.

Sociology is similarly divided into three types of sociological knowledge, each with its own strengths, limitations, and practical purposes: **positivist sociology** focuses on generating types of knowledge useful for controlling or administering social life; **interpretive sociology** on types of knowledge useful for promoting greater mutual understanding and consensus among members of society, and **critical sociology** on types of knowledge useful for changing and improving the world, for emancipating people from conditions of servitude. Within these three types of sociological knowledge, we will discuss five paradigms of sociological thinking: **quantitative sociology, structural functionalism**, **historical materialism**, **feminism**, and **symbolic interactionism**.

1. Positivism

The **positivist perspective** in sociology — introduced above with regard to the pioneers of the discipline, August Comte and Émile Durkheim — is most closely aligned with the forms of knowledge associated with the natural sciences. The emphasis is on empirical observation and measurement (i.e., observation through the senses), value neutrality or objectivity, and the search for law-like statements about the social world (analogous to Newton's laws of gravity for the natural world). Since mathematics and statistical operations are the main forms of logical demonstration in the natural scientific explanation, positivism relies on translating human phenomena into quantifiable units of measurement. It regards the social world as an objective or "positive" reality, in no essential respects different from the natural world. Positivism is oriented to developing a knowledge useful for controlling or administering social life, which explains its ties to the projects of social engineering going back to Comte's original vision for sociology. Two forms of positivism have been dominant in sociology since the 1940s: **quantitative sociology** and **structural functionalism**.

Quantitative Sociology

In contemporary sociology, positivism is based on four main "rules" that define what constitutes valid knowledge and what types of questions may be reasonably asked (Bryant, 1985):

> 1. The rule of empiricism: We can only know about things that are actually given in experience. We cannot validly make claims about things that are invisible, unobservable, or supersensible like metaphysical, spiritual, or moral truths.
> 2. The rule of value neutrality: Scientists should remain value-neutral in their research because it follows from the rule of empiricism that "values" have no empirical content that would allow their validity to be scientifically tested.
> 3. The unity of the scientific method rule: All sciences have the same basic principles and practices whether their object is natural or human.
> 4. The rule of law-like statements: The type of explanation sought by scientific inquiry is the formulation of general laws (like the law of gravity) to explain specific phenomena (like the falling of a stone).

Much of what is referred to today as **quantitative sociology** fits within this paradigm of positivism. Quantitative

sociology uses statistical methods such as surveys with large numbers of participants to quantify relationships between social variables. In line with the "unity of the scientific method" rule, quantitative sociologists argue that the elements of human life can be measured and quantified — described in numerical terms — in essentially the same way that natural scientists measure and quantify the natural world in physics, biology, or chemistry. Researchers analyze this data using statistical techniques to see if they can uncover patterns or "laws" of human behaviour. Law-like statements concerning relationships between variables are often posed in the form of statistical relationships or multiple linear regression formulas; these measure and quantify the degree of influence different causal or independent variables have on a particular outcome or dependent variable. (Independent and dependent variables will be discussed in Chapter 2). For example, the degree of religiosity of an individual in Canada, measured by the frequency of church attendance or religious practice, can be predicted by a combination of different independent variables such as age, gender, income, immigrant status, and region (Bibby, 2012). This approach is value neutral for two reasons: firstly because the quantified data is the product of methods of systematic empirical observation that seek to minimize researcher bias, and secondly because "values" *per se* are human dispositions towards what "should be" and therefore cannot be observed like other objects or processes in the world. Quantitative sociologists might be able to survey what people say their values are, but they cannot determine through quantitative means what *is* valuable or what *should* be.

Structural Functionalism

Structural Functionalism also falls within the positivist tradition in sociology due to Durkheim's early efforts to describe the subject matter of sociology in terms of objective **social facts** — "social facts must be studied as things, that is, as realities external to the individual" (Durkheim, 1895/1997) — and to explain them in terms of their social functions.

Following Durkheim's insight, structural functionalism therefore sees society as composed of **structures** — regular patterns of behaviour and organized social arrangements that persist through time (e.g., like the institutions of the family or the occupational structure) — and the **functions** they serve: the biological and social needs of individuals who make up that society. In this respect, society is like a body that relies on different organs to perform crucial functions. He argued that just as the various organs in the body work together to keep the entire system functioning and regulated, the various parts of society work together to keep the entire society functioning and regulated. By "parts of society," Spencer was referring to such social institutions as the economy, political systems, health care, education, media, and religion.

According to structural functionalism, society is composed of different social **structures** that perform specific **functions** to maintain the operation of society as a whole. *Structures* are simply regular, observable patterns of behaviour or organized social arrangements that persist through time. The institutional structures that define roles and interactions in the family, workplace, or church, etc. are structures. *Functions* refer to how the various needs of a society (i.e., for properly socialized children, for the distribution of food and resources, or for a unified belief system, etc.) are satisfied. Different societies have the same basic functional requirements, but they meet them using different configurations of social structure (i.e., different types of kinship system, economy, or religious practice). Thus, society is seen as a *system* not unlike the human body or an automobile engine.

In fact the English philosopher and biologist Herbert Spencer (1820–1903) likened society to a human body. Each structure of the system performs a specific function to maintain the orderly operation of the whole (Spencer, 1898). When they do not perform their functions properly, the system as a whole is threatened. The heart pumps the blood, the vascular system transports the blood, the metabolic system transforms the blood into proteins needed for cellular processes, etc. When the arteries in the heart get blocked, they no longer perform their function. The heart fails, and the system as a whole collapses. In the same way, the family structure functions to socialize new members of society (i.e., children), the economic structure functions to adapt to the environment and distribute resources, the religious structure functions to provide common beliefs to unify society, etc. Each structure of society provides a specific and necessary function to ensure the ongoing maintenance of the whole. However, if the family fails to effectively socialize children, or the economic system fails to distribute resources equitably, or religion fails to provide a credible belief system, repercussions are felt throughout the system. The other structures have to adapt, causing further repercussions. *With respect to a system, when one structure changes, the others change as well.* Spencer continued the analogy to the body by pointing out that societies evolve just as the bodies of humans and other animals do (Maryanski and Turner, 1992).

According to American sociologist Talcott Parsons (1881–1955), in a healthy society, all of these parts work together to

produce a stable state called **dynamic equilibrium** (Parsons, 1961). Parsons was a key figure in systematizing Durkheim's views in the 1940s and 1950s. He argued that a sociological approach to social phenomena must emphasize the systematic nature of society at all levels of social existence: the relation of definable "structures" to their "functions" in relation to the needs or "maintenance" of the system. His **AGIL schema** provided a useful analytical grid for sociological theory in which an individual, an institution, or an entire society could be seen as a system composed of structures that satisfied four primary functions:

- Adaptation (A): how the system adapts to its environment;
- Goal attainment (G): how the system determines what its goals are and how it will attain them;
- Integration (I): how the system integrates its members into harmonious participation and social cohesion; and
- (Latent) Pattern Maintenance (L): how basic cultural patterns, values, belief systems, etc. are regulated and maintained.

So for example, the social system as a whole relied on the *economy* to distribute goods and services as its means of *adaptation* to the natural environment; on the *political system* to make decisions as its means of *goal attainment*; on *roles and norms* to regulate social behaviour as its means of social *integration;* and on *cultural institutions* to reproduce common values as its means of *latent pattern maintenance.* Following Durkheim, he argued that these explanations of social functions had to be made at the macro-level of systems and not at the micro-level of the specific wants and needs of individuals. In a system, there is an interrelation of component parts where a change in one component affects the others *regardless* of the perspectives of individuals.

Another noted structural functionalist, Robert Merton (1910–2003), pointed out that social processes can have more than one function. **Manifest functions** are the consequences of a social process that are sought or anticipated, while **latent functions** are the unsought consequences of a social process. A manifest function of college education, for example, includes gaining knowledge, preparing for a career, and finding a good job that utilizes that education. Latent functions of your college years include meeting new people, participating in extracurricular activities, or even finding a spouse or partner. Another latent function of education is creating a hierarchy of employment based on the level of education attained. Latent functions can be beneficial, neutral, or harmful. Social processes that have undesirable consequences for the operation of society are called **dysfunctions**. In education, examples of dysfunction include getting bad grades, truancy, dropping out, not graduating, and not finding suitable employment.

Criticisms of Positivism

The main criticisms of both quantitative sociology and structural functionalism have to do with whether social phenomena can truly be studied like the natural phenomena of the physical sciences. Critics challenge the way in which social phenomena are regarded as objective social facts. On one hand, interpretive sociologists suggest that the quantification of variables in *quantitative sociology* reduces the rich complexity and ambiguity of social life to an abstract set of numbers and statistical relationships that cannot capture the meaning it holds for individuals. Measuring someone's depth of religious belief or "religiosity" by the number of times they attend church in a week explains very little about the religious experience itself. Similarly, interpretive sociology argues that *structural functionalism*, with its emphasis on macro-level systems of structures and functions tends to reduce the individual to the status of a sociological "dupe," assuming pre-assigned roles and functions without any individual agency or capacity for self-creation.

On the other hand, critical sociologists challenge the conservative tendencies of quantitative sociology and structural functionalism. Both types of positivist analysis represent themselves as being objective, or value-neutral, whereas critical sociology notes that the context in which they are applied is always defined by relationships of power and struggles for social justice. In this sense sociology cannot be neutral or purely objective. The context of social science is never neutral. However, both types of positivism also have conservative assumptions built into their basic approach to social facts. The focus in *quantitative sociology* on observable facts and law-like statements presents an ahistorical and deterministic picture of the world that cannot account for the underlying historical dynamics of power relationships and class, gender, or other struggles. One can empirically observe the trees but not see the forest so to speak.

Similarly, the focus on the needs and the smooth functioning of social systems in *structural functionalism* supports a conservative viewpoint because it relies on an essentially static model of society. The functions of each structure are

understood in terms of the needs of the social system as it exists at a particular moment in time. Each individual has to fit the function or role designated for them. Change is not only dysfunctional or pathological, because it throws the whole system into disarray, it also is very difficult to understand why change occurs at all if society is functioning as a system. Therefore, structural functionalism has a strong conservative tendency, which is illustrated by some of its more controversial arguments. For example, Davis and Moore (1944) argued that inequality in society is good (or necessary) because it functions as an incentive for people to work harder. Talcott Parsons (1954) argued that the gender division of labour in the nuclear family between the husband/breadwinner and wife/housekeeper is good (or necessary) because the family will function coherently only if each role is clearly demarcated. In both cases, the order of the system is not questioned, and the historical sources of inequality are not analysed. Inequality in fact performs a useful function. Critical sociology challenges both the social injustice and practical consequences of social inequality. In particular, social equilibrium and function must be scrutinized closely to see whose interests they serve and whose interests they suppress.

2. Interpretive Sociology

The interpretive perspective in sociology is aligned with the hermeneutic traditions of the humanities like literature, philosophy, and history. The focus in interpretative sociology is on understanding or interpreting human activity in terms of the meanings that humans attribute to it. It is sometimes referred to as *social constructivism* to capture the way that individuals *construct* a world of meaning that affects the way people experience the world and conduct themselves within it. The world evidently has a reality outside of these meanings, but interpretive sociology focuses on analysing the processes of collective meaning construction that give us access to it.

Max Weber's Verstehende (understanding) sociology is often cited as the origin of this perspective in sociology because of his emphasis on the centrality of meaning and intention in social action:

> Sociology… is a science which attempts the interpretive understanding of social action in order thereby to arrive at a causal explanation of its course and effects. In "action" is included all human behaviour when and in so far as the acting individual attaches a subjective meaning to it…. [Social action is] action mutually oriented to that of each other (Weber, 1922).

This emphasis on the meaningfulness of social action — action to which individuals attach subjective meanings and interpret those of others — is taken up later by phenomenology, ethnomethodology, symbolic interactionism and various contemporary schools of social constructivism. The interpretive perspective is concerned with developing a knowledge of social interaction from the point of view of the meanings individuals attribute to it. Social interaction is a meaning-oriented practice. As a result of its research, interpretive sociology promotes the goal of greater mutual understanding and the possibility of consensus among members of society.

Symbolic Interactionism

Symbolic interactionism is one of the main schools of interpretive sociology. It provides a theoretical perspective that helps scholars examine how relationships between individuals in society are conducted on the basis of shared understandings. This perspective is centred on the notion that communication — or the exchange of meaning through language and symbols — is how people make sense of their social worlds. As pointed out by Herman and Reynolds (1994), this viewpoint also sees people as active in shaping their world, rather than as entities who are acted upon by society (Herman and Reynolds, 1994). This approach looks at society and people from a micro-level perspective.

George Herbert Mead (1863–1931) is considered one of the founders of symbolic interactionism. His work in *Mind, Self and Society* (1934) on the "self" and the stages of child development as a sequence of role-playing capacities provides the classic analyses of the perspective. We will discuss Mead further in Chapter 5 (Socialization) but Mead's key insight is that the self develops only through social interaction with others. We *learn* to be ourselves by the progressive incorporation of the attitudes of others towards us into our concept of self.

His student Herbert Blumer (1900–1987) synthesized Mead's work and popularized the theory. Blumer coined the term "symbolic interactionism" and identified its three basic premises:

1. Humans act toward things on the basis of the meanings they ascribe to those things.

> 2. The meaning of such things is derived from, or arises out of, the social interaction that one has with others and the society.
> 3. These meanings are handled in, and modified through, an interpretative process used by the person in dealing with the things he or she encounters (Blumer, 1969).

In other words, human interaction is not determined in the same manner as natural events. Symbolic interactionism focuses on how individuals reach common definitions of the situation in which they are involved. Through the back and forth of mutual interactions and communication (i.e., symbolic interaction), individuals move from ambiguous or undefined situations to those characterized by mutually shared meanings. On the basis of shared meanings, a common and coordinated course of action can be pursued. People are able to decide how to help a friend diagnosed with cancer, how to divide up responsibilities at work, or even how to agree to disagree when an irresolvable conflict arises. The passport officer at the airport makes a gesture with her hand, or catches your eye, which you interpret as a signal to step forward in line and pass her your passport so that she can examine its validity. Together you create a joint action — "checking the passport" — which is just one symbolic interaction in a sequence that travelers typically engage in when they arrive at the airport of their vacation destination. Social life can be seen as the stringing together or aligning of multiple joint actions. Symbolic interactionism emphasizes that groups of individuals have the freedom and agency to define their situations in potentially numerous ways.

Social scientists who apply symbolic-interactionist thinking look for patterns of interaction between individuals. Their studies often involve observation of one-on-one interactions. For example, Howard Becker's (1953) argued in his classic study of marijuana users that the effects of marijuana have less to do with its physiological qualities in the body than with the process of communication (or symbolic interaction) about the effects. New marijuana users need to go through three stages to become a regular user: they need to learn from experienced smokers how to identify the effects, how to enjoy them, and how to attach meaning to them (i.e., that the experience is funny, strange or euphoric, etc.). Becker emphasizes, therefore, that marijuana smoking is a thoroughly social process and that the experience of "being high" is as much a product of mutual interactions as it is a purely bio-chemical process. In a sense, smoking marijuana could be experienced in numerous ways because the individuals involved exercise agency. No fixed reality, physiological or otherwise, pre-exists the mutual interactions of the users.

Symbolic interactionism has also been important in bringing to light the experiences and worlds of individuals who are typically excluded from official accounts of the social order. Howard Becker's *Outsiders* (1963) for example described the process of **labelling** in which individuals come to be characterized or labelled as deviants by authorities. The sequence of events in which a young person, for example, is picked up by police for an offense, defined by police and other authorities as a "young offender," processed by the criminal justice system, and then introduced to criminal subcultures through contact with experienced offenders is understood from the subjective point of view of the young person. The significance of labelling theory is to show that individuals are not born deviant or criminal, but become criminal through an institutionalized symbolic interaction with authorities. As Becker says, deviance is not simply a social fact, as Durkheim might argue, but the product of a process of definition by moral entrepreneurs, authorities, and other privileged members of society:

> …*social groups create deviance by making rules whose infraction creates deviance*, and by applying those roles to particular people and labelling them as outsiders. From this point of view, deviance is *not* a quality of the act the person commits, but rather a consequence of the application by other of rules and sanctions to an "offender." The deviant is one to whom that label has been successfully applied; deviant behavior is behaviour that people so label (1963).

Studies that use the symbolic interactionist perspective are more likely to use qualitative research methods, such as in-depth interviews or participant observation, rather than quantitative methods because they seek to understand the symbolic worlds in which research subjects live.

Criticisms of Interpretive Sociology

From the point of view of positivism, one of the problems of interpretive paradigms that focus on micro-level interactions

is that it is difficult to generalize from very specific situations, involving very few individuals, to make social scientific claims about the nature of society as a whole. The danger is that, while the rich texture of face-to-face social life can be examined in detail, the results will remain purely descriptive without any explanatory or analytical strength. In discussing the rich detail of the rituals and dynamics of authority in a street gang, can a sociologist make conclusions about the phenomenon of street gangs in general, or determine the social factors that lead individuals to join street gangs? Can one go from a particular observation to a general claim about society?

In a similar fashion, it is very difficult to get at the historical context or the relations of power that structure or condition face-to-face, symbolic interactions. The perspective on social life as a spontaneous, unstructured and unconstrained domain of agency and subjective meanings has difficulty accounting for the ways that social life does become structured and constrained. The emphasis on face-to-face processes of communication and the emergent or spontaneous qualities of social situations is unable to account for the reproduction of large-scale power relations and structures. Starting from a micro-level analysis, it is difficult to explain how the millions of ongoing symbolic interactions take on particular institutional forms or are subject to historical transformations. In the case of marijuana users, for example, it is difficult to go from Becker's analysis of symbolic interaction between individuals to a strong explanation for the reasons why marijuana was made illegal in the first place, how the underground trade in marijuana works (and contextualizes the experience of the beginning user), or what the consequences of criminalization are on political discourses, the criminal justice system, and the formation of subcultures (i.e., like the jazz musician subculture Becker studied in the 1950s). Essential aspects of the political context of specific symbolic interactions fall outside the scope of the analysis, which is why, from a critical perspective, the insights of microsociology need to be broadened through the use of the sociological imagination.

3. Critical Sociology

The critical perspective in sociology has its origins in social activism, social justice movements, revolutionary struggles, and radical critique. As Karl Marx put it, its focus was the "ruthless critique of everything existing" (Marx, 1843). The key elements of this analysis are the critique of power relations and the understanding of society as historical — subject to change, struggle, contradiction, instability, social movement, and radical transformation. Rather than objectivity and value neutrality, the tradition of critical sociology promotes practices of liberation and social change in order to achieve universal social justice. As Marx stated, "the philosophers have only interpreted the world, in various ways; the point is to change it" (1845). This is why it is misleading to call critical sociology "conflict theory" as some introductory textbooks do. While conflict is certainly central to the critical analyses of power and domination, the focus of critical sociology is on developing types of knowledge and political action that enable emancipation from power relations (i.e., from the conditions of conflict in society). Historical materialism, feminism, environmentalism, anti-racism, queer studies, and poststructuralism are all examples of the critical perspective in sociology.

One of the outcomes of systematic analyses such as these is that they generate questions about the relationship between our everyday life and issues concerning social justice and environmental sustainability. In line with the philosophical traditions of the Enlightenment, critical sociology is sociology with an "emancipatory interest" (Habermas, 1972); that is, a sociology that seeks not simply to understand or describe the world, but to use sociological knowledge to change and improve the world, and to emancipate people from conditions of servitude.

What does the word *critical* mean in this context? Critical sociologists argue that it is important to understand that the critical tradition in sociology is not about complaining or being "negative." Nor is it about adopting a moral position from which to judge people or society. It is not about being "subjective" or "biased" as opposed to "objective." As Herbert Marcuse put it in *One Dimensional Man* (1964), critical sociology involves two value judgments:

> 1. That human life is worth living, or rather that it can be and ought to be made worth living; and
> 2. In a given society, specific possibilities exist for the amelioration of human life and the specific ways and means of realizing these possibilities.

Critical sociology therefore rejects the notion of a value-free social science, but does not thereby become a moral exercise or an individual "subjective" value preference as a result. Being critical in the context of sociology is about using objective, empirical knowledge to assess the possibilities and barriers to improving or "ameliorating" human life.

Historical Materialism

The tradition of **historical materialism** that developed from Karl Marx's work is one of the central frameworks of critical sociology. Historical materialism concentrates on the study of how our everyday lives are structured by the connection between relations of power and economic processes. The basis of this approach begins with the macro-level question of how specific relations of power and specific economic formations have developed historically. These form the context in which the institutions, practices, beliefs, and social rules (norms) of everyday life are situated. The elements that make up a culture — a society's shared practices, values, beliefs, and artifacts — are structured by the society's economic **mode of production**: the way human societies act upon their environment and its resources in order to use them to meet their needs. Hunter-gatherer, agrarian, feudal, and capitalist modes of production have been the economic basis for very different types of society throughout world history.



Figure 1.16. The Last of the Clan painted by Thomas Faed, (1865). [Long Description] (Photo courtesy of Thomas Faed/Wikimedia Commons)

It is not as if this relationship is always clear to the people living in these different periods of history, however. Often the mechanisms and structures of social life are obscure. For example, it might not have been clear to the Scots who were expelled from their ancestral lands in Scotland during the Highland clearances of the 18th and 19th centuries and who emigrated to the Red River settlements in Rupert's Land (now Manitoba) that they were living through the epochal transformation from feudalism to capitalism. This transition was nevertheless the context for the decisions individuals and families made to emigrate from Scotland and attempt to found the Red River Colony. It might also not have been clear to them that they were participating in the development of colonial power relationships between the Indigenous people of North America and the Europeans that persist up until today. Through contact with the Scots and the French fur traders, the Cree and Anishinabe were gradually drawn out of their own Indigenous modes of production and into the developing global capitalist economy as fur trappers and provisioners for the early European settlements. It was a process that eventually led to the loss of control over their lands, the destruction of their way of life, the devastating spread of European diseases, the imposition of the Indian Act, the establishment of the residential school system, institutional and everyday racism, and an enduring legacy of intractable social problems.

In a similar way, historical materialism analyzes the constraints that define the way individuals review their options and make their decisions in present-day society. From the types of career to pursue to the number of children to have, the decisions and practices of everyday life must be understood in terms of the 20th century shift to corporate ownership and the 21st century context of globalization in which corporate decisions about investments are made.

The historical materialist approach can be called dialectical. **Dialectics** in sociology proposes that social contradiction, opposition, and struggle in society drive processes of social change and transformation. It emphasizes four components in

its analysis (Naiman, 2012). The first is that everything in society is related — it is not possible to study social processes in isolation. The second is that everything in society is dynamic (i.e., in a process of continuous social change). It is not possible to study social processes as if they existed outside of history. The third is that the gradual accumulation of many social changes eventually create a qualitative transformation or social turning point.

For example, the self-immolation of the street vender Mohamed Bouazizi in 2010 lead to the Tunisian revolution of 2011 because it "crystallized" the multitude of everyday incidences in which people endured the effects of high unemployment, government corruption, poor living conditions, and a lack of rights and freedoms. It is not possible to examine quantitative changes independently of the qualitative transformations they produce, and vice versa.

The fourth analytical component of the dialectical approach is that the tensions that form around relationships of power and inequality in society are the key drivers of social change. In the language of Marx, these tensions are based on "contradictions" built into the organization of the economic or material relationships that structure our livelihoods, our relationships to each other, our relationship to the environment, and our place within the global community. The capitalist class and the working class do not simply exist side by side as other social groups do (e.g., model boat enthusiasts and Christian fundamentalists), but exist in a relationship of contradiction. Each class depends on the other for its existence, but their interests are fundamentally irreconcilable and therefore the relationship is fraught with tension and conflict. Social tensions and contradictions in society may simmer or they may erupt in struggle, but in either case it is not possible to study social processes as if they were independent of the historical formations of power that both structure them and destabilize them.

Making Connections: Sociology in the Real World

"Wanna go for a coffee?"



Figure 1.17. According to a 2010 study, 65% of Canadians drink coffee daily. The average coffee drinker drinks 2.8 cups of coffee per day. Source: Coffee Association of Canada, 2010. (Photo courtesy of Duncan C/Flickr)

A good example of the dialectical approach to everyday social life would be to think about all the social relationships that are involved in meeting a friend for a cup of coffee. This is a common everyday event that usually passes without a great deal of sociological reflection. On the one hand, it might offer the sociologist numerous opportunities to study

the social aspects of this event in isolation or at a micro-level: conversation analysis, the dynamics of friend relationships, addiction issues with caffeine, consumer preferences for different beverages, beliefs about caffeine and mental alertness, etc. In this regard, a symbolic interactionist might ask: Why is drinking coffee at the center of this specific interaction? What does coffee *mean* for you and your friend who meet to drink it?

On the other hand, if we were to take a more systematic and critical sociological view of the activity of coffee drinking, we would note how the practice also embeds us in a series of relationships to others and the environment that are not immediately apparent if the activity is viewed in isolation (Swift, Davies, Clarke and Czerny, 2004). When we purchase a cup of coffee, we enter into a relationship with the growers in Central and South America. We are involved with their working conditions and with the global structures of private ownership and distribution that make selling coffee a profitable business. We are also involved with the barista at the counter who works in the coffee shop for a living; with the fluctuations of supply, demand, competition, and market speculation that determine the price of coffee; with the marketing strategies that lead us to identify with specific beverage choices and brands; and with the modifications to the natural environment where the coffee is grown, through which it is transported, and where, finally, the paper cups and other waste are disposed of, etc.

Ultimately, over our cup of coffee, we find ourselves in the midst of a long political and historical process that is part of the formation of low wage or subsistence farming in Central and South America, the transfer of wealth to North America, and recently, various forms of resistance to this process like the fair trade movement. Despite the fact that we can be largely unaware of the web of relationships that we have entered into when we sit down to coffee with our friend, a systematic analysis would emphasize that our casual chat over coffee is just the tip of a vast iceberg composed of the activities and circumstances of countless individuals, including the activities and work relationships we ourselves engage in to earn the money to pay for the coffee. These relationships involve us in economic and political structures every time we have a cup of coffee.

Feminism

Another major school of critical sociology is feminism. From the early work of women sociologists like Harriet Martineau, feminist sociology has focused on the power relationships and inequalities between women and men. How can the conditions of inequality faced by women be addressed? As Harriet Martineau put it in *Society in America* (1837):

> All women should inform themselves of the condition of their sex, and of their own position. It must necessarily follow that the noblest of them will, sooner or later, put forth a moral power which shall prostrate cant [hypocrisy], and burst asunder the bonds (silken to some but cold iron to others) of feudal prejudice and usages. In the meantime is it to be understood that the principles of the Declaration of Independence bear no relation to half of the human race? If so, what is the ground of this limitation?

Feminist sociology focuses on analyzing the grounds of the limitations faced by women when they claim the right to equality with men.

Inequality between the genders is a phenomenon that goes back at least 4,000 years (Lerner, 1986). Although the forms and ways in which it has been practised differ between cultures and change significantly through history, its persistence has led to the formulation of the concept of patriarchy. **Patriarchy** refers to a set of institutional structures (like property rights, access to positions of power, relationship to sources of income) that are based on the belief that men and women are dichotomous and unequal categories. Key to patriarchy is what might be called the **dominant gender ideology** toward sexual differences: the assumption that physiological sex differences between males and females are related to differences in their character, behaviour, and ability (i.e., their gender). These differences are used to justify a gendered division of social roles and inequality in access to rewards, positions of power, and privilege. The question that feminists ask therefore is: How does this distinction between male and female, and the attribution of different qualities to each, serve to organize our institutions and to perpetuate inequality between the sexes? How is the family, law, the occupational structure, religious institutions, and the division between public and private spheres of life organized on the basis of inequality between the genders?

Feminism is a distinct type of critical sociology. There are considerable differences between types of feminism,

however; for example, the differences often attributed to the first wave of feminism in the 19th and early 20th centuries, the second wave of feminism from the 1950s to the 1970s, and the third wave of feminism from the 1980s onward. Despite the variations between the different types of feminist approach, there are four characteristics that are common to the feminist perspective:

1. Gender differences are the central focus or subject matter.
2. Gender relations are viewed as a social problem: the site of social inequalities, strains, and contradictions.
3. Gender relations are not immutable: they are sociological and historical in nature, subject to change and progress.
4. Feminism is about an emancipatory commitment to change: the conditions of life that are oppressive for women need to be transformed.

One of the keen sociological insights that emerged with the feminist perspective in sociology is that "the personal is political." Many of the most immediate and fundamental experiences of social life — from childbirth to who washes the dishes to the experience of sexual violence — had simply been invisible or regarded as unimportant politically or socially. Dorothy Smith's development of **standpoint theory** was a key innovation in sociology that enabled these issues to be seen and addressed in a systematic way (Smith, 1977). She recognized from the consciousness-raising exercises and encounter groups initiated by feminists in the 1960s and 1970s that many of the immediate concerns expressed by women about their personal lives had a commonality of themes. These themes were nevertheless difficult to articulate in sociological terms let alone in the language of politics or law.

Part of the issue was sociology itself. Smith argued that instead of beginning sociological analysis from the abstract point of view of institutions or systems, women's lives could be more effectively examined if one began from the "actualities" of their lived experience in the immediate local settings of everyday/everynight life. She asked, what are the common features of women's everyday lives? From this standpoint, Smith observed that women's position in modern society is acutely divided by the experience of **dual consciousness**. Every day women crossed a tangible dividing line when they went from the "particularizing work in relation to children, spouse, and household" to the abstract, institutional world of text-mediated work, or in their dealings with schools, medical systems, or government bureaucracies. In the abstract world of institutional life, the actualities of local consciousness and lived life are "obliterated" (Smith, 1977). While the standpoint of women is grounded in bodily, localized, "here and now" relationships between people — due to their obligations in the domestic sphere — society is organized through "relations of ruling," which translate the substance of actual lived experiences into abstract bureaucratic categories. Power and rule in society, especially the power and rule that constrain and coordinate the lives of women, operate through a problematic "move into transcendence" that provides accounts of social life as if it were possible to stand outside of it. Smith argued that the abstract concepts of sociology, at least in the way that sociology was taught in the 1960s and 1970s, only contributed to the problem.

Criticisms of Critical Sociology

Whereas critical sociologists often criticize positivist and interpretive sociology for their conservative biases, the reverse is also true. In part the issue is about whether sociology can be "objective," or value-neutral, or not. However, at a deeper level the criticism is often aimed at the radical nature of critical analyses. Marx's critique of capitalism and the feminist critique of patriarchy for example lead to very interesting insights into how structures of power and inequality work, but from a point of view that sees only the most revolutionary transformation of society as a solution.

Critical sociology is also criticized from the point of view of interpretive sociology for overstating the power of dominant groups to manipulate subordinate groups. For example, media representations of women are said to promote unobtainable standards of beauty or to reduce women to objects of male desire. This type of critique suggests that individuals are controlled by media images rather than recognizing their independent ability to reject media influences or to interpret media images for themselves. In a similar way, interpretive sociology challenges critical sociology for implying that people are purely the products of macro-level historical forces and struggles rather than individuals with a capacity for individual and collective agency. To be fair, Marx did argue that "Men make their own history;" it is just that

they "do not make it just as they please; they do not make it under circumstances chosen by themselves, but under circumstances encountered, given, and transmitted from the past" (Marx, 1851).

Summary

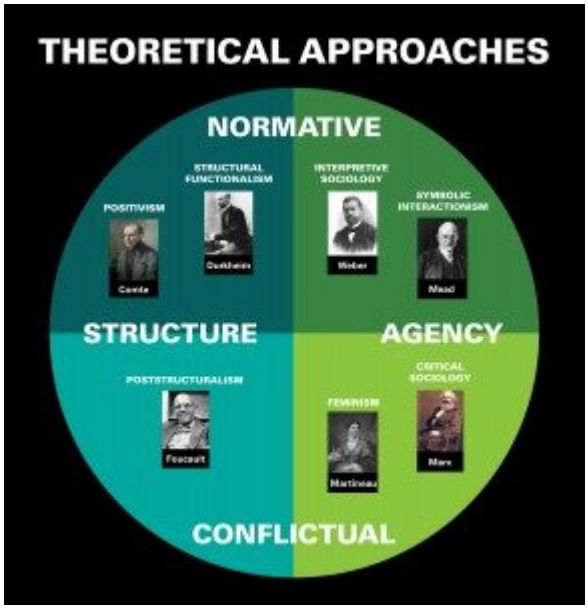


Figure 1.18. Theoretical Approaches Summary. [Long Description] (Source: William Little and TRU Media)

To get a clearer picture of how these three sociological perspectives differ, it is helpful to map them out using a diagram. As we noted above, the sociological perspectives differ according to the initial assumptions of the researcher. One way to show this is to position them along two axes according to (a) whether they view society as governed by agreed-upon norms (normative) or by power relations and conflict (conflictual), and (b) whether individuals are subject to structures beyond their control (structure) or are agents who act and change the conditions of their existence (agency). The emphasis of positivism on generating law-like statements suggests that individuals are not agents, but rather are subject to scientific laws (structure); moreover, its focus on empirical observation relies on the assumption that an underlying consensus exists about the meaning of observed behaviours. That is, there is no essential difficulty in understanding what one is "seeing," and the agreement between the observer and the observed with respect to the meaning of the observed behaviours (normative) can be taken for granted. Interpretive sociology also emphasizes the importance of shared meanings that guide human behaviour (normative), but at the same time — especially in the tradition of symbolic interactionism — focuses on how these shared meanings are created through the mutual interactions of agents in concerted action (agency). Critical sociology does not assume that an underlying agreement or consensus exists about the norms governing society; rather, the accent is on analyzing relations of power and conflict (conflictual). Some perspectives in critical sociology like Marxism and feminism emphasize the agency of collective actors like the working class or women's movements in praxis or struggles for change (agency), whereas other perspectives like poststructuralism emphasize the way in which subjects or agents are themselves constructed within relations of power (structure).

Overall, since social reality is complex and multi-faceted, the possibility of fundamental disagreement exists between the different theoretical approaches in sociology. Is society characterized by conflict or consensus? Is human practice determined by external social structures or is it the product of choice and agency? Does society have a reality over and above the lives of individuals or are the lives of individuals the only reality? Is human experience unique because it revolves around the meanings of social action, or is it essentially no different than any other domain studied by science? The answer to each of these questions is: it is both. Similar to the problem in physics about whether light is a particle or a wave, society appears in one guise or another depending on the perspective one takes or the research tool that one adopts. Using Habermas' schema (discussed previously), sociology takes different forms depending on whether it is to be used for the

purposes of administration (e.g., positivism), mutual understanding (e.g., interpretive sociology), or social change (e.g., critical sociology). However, just like the wave/particle uncertainty in physics, the fundamental ambiguity in determining which sociological perspective to adopt does not prevent brilliant insights into the nature of social experience from being generated.

1.4. Why Study Sociology?



Figure 1.19. Tommy Douglas (1904-1986). As premier of Saskatchewan's CCF government, Douglas introduced legislation for the first publicly funded health care plan in Canada in 1961. Sociologist Bernard Blishen (b. 1919) was the research director for the Royal Commission on Health Services which drew up the plan for Canada's national medicare program in 1964. (Photo National Archives of Canada, C-036222)

When Bernard Blishen picked up the phone one day in 1961, he was surprised to hear Chief Justice Emmett Hall on the other end of the line asking him to be the research director for the newly established Royal Commission on Health Services. Publically funded health care had been introduced for the first time in Canada that year, by a socialist Co-operative Commonwealth Federation (CCF) government in Saskatchewan, amid bitter controversy. Doctors in Saskatchewan went on strike and private health care insurers mounted an expensive anti-public health care campaign. Because it was a Conservative government commission, appointed by Prime Minister John Diefenbaker, Blishen's colleagues advised him that it was going to be a whitewash document to defend the interests of private medical care. However, Blishen took on the project as a challenge, and when the commission's report was published it advocated that the Saskatchewan plan be adopted nationally (Vaughan, 2004).

Blishen went on to work in the field of medical sociology and also created a widely-used index to measure socioeconomic status known as the Blishen scale. He received the Order of Canada in 2011 in recognition of his contributions to the creation of public health care in Canada.

Since it was first founded, many people interested in sociology have been driven by the scholarly desire to contribute knowledge to this field, while others have seen it as way not only to study society, but also to improve it. Besides the creation of public health care in Canada, sociology has played a crucial role in many important social reforms such as equal opportunity for women in the workplace, improved treatment for individuals with mental and learning disabilities, increased recognition and accommodation for people from different ethnic backgrounds, the creation of hate crime legislation, the right of Aboriginal populations to preserve their land and culture, and prison system reforms.

The prominent sociologist Peter L. Berger (b. 1929), in his 1963 book *Invitation to Sociology: A Humanistic Perspective*, describes a sociologist as "someone concerned with understanding society in a disciplined way." He asserts that sociologists have a natural interest in the monumental moments of people's lives, as well as a fascination with banal, everyday occurrences. Berger also describes the "aha" moment when a sociological theory becomes applicable and understood:

> [T]here is a deceptive simplicity and obviousness about some sociological investigations. One reads them, nods at the familiar scene, remarks that one has heard all this before and don't people have better things to do than to waste their time on truisms — until one is suddenly brought up against an insight that radically questions everything one had previously assumed about this familiar scene. This is the point at which one begins to sense the excitement of sociology (Berger, 1963).

Sociology can be exciting because it teaches people ways to recognize how they fit into the world and how others perceive them. Looking at themselves and society from a sociological perspective helps people see where they connect to different groups based on the many different ways they classify themselves and how society classifies them in turn. It raises awareness of how those classifications — such as economic and status levels, education, ethnicity, or sexual orientation — affect perceptions.

Sociology teaches people not to accept easy explanations. It teaches them a way to organize their thinking so that they can ask better questions and formulate better answers. It makes people more aware that there are many different kinds of people in the world who do not necessarily think the way they do. It increases their willingness and ability to try to see the world from other people's perspectives. This prepares them to live and work in an increasingly diverse and integrated world.

Making Connections: Sociological Research

Farming and Locavores: How Sociological Perspectives Might View Food Consumption

The consumption of food is a commonplace, a daily occurrence, yet it can also be associated with important moments in our lives. Eating can be an individual or a group action, and eating habits and customs are influenced by our cultures. In the context of society, our nation's food system is at the core of numerous social movements, political issues, and economic debates. Any of these factors might become a topic of sociological study.

A structural-functional approach to the topic of food consumption might be interested in the role of the agriculture industry within the nation's economy and the social system as a whole. Food production is a primary example of Talcott Parsons' function of adaptation: how human systems adapt to environmental systems. In this regard the structural-functionalist would be interested in the potential for disequilibrium in the human/environment relationship that has resulted from increases in population and the intensification of agricultural production — from the early days of manual-labour farming to modern mechanized agribusiness. In many respects the concerns of environmentalists and others, with respect to the destructive relationship between industrial agriculture and the ecosystem, are the results of a dysfunctional system of adaptation. The concept of sustainable agriculture, promoted by Michael Pollan (2006) and others, points to the changes needed to return the interface between humans and the natural environment to a state of dynamic equilibrium.

A sociologist viewing food consumption through a symbolic interactionist lens would be more interested in micro-level topics of the shared meaning of food, such as the symbolic use of food in religious rituals, the attitudes towards

food in fast food restaurants, or the role it plays in the social interaction of a family dinner. This perspective might also study the interactions among group members who identify themselves based on their sharing a particular diet, such as vegans (people who do not eat meat or dairy products) or locavores (people who strive to eat locally-produced food). The increasing concern that people have with their diets speaks to the way that the life of the biological body is as much a symbolic reality, interpreted within contemporary discourses on health risks and beauty, as it is a biological reality.

A critical sociologist might be interested in the power differentials present in the regulation of the food industry, exploring where people's right to information intersects with corporations' drive for profit and how the government mediates those interests. Critical sociologists might also be interested in the power and powerlessness experienced by local farmers versus large farming conglomerates. In the documentary *Food Inc.*, the plight of farmers resulting from Monsanto's patenting of seed technology is depicted as a product of the corporatization of the food industry. Another topic of study might be how nutrition and diet varies between different social classes. The industrialization of the food chain has created cheaper foods than ever, yet with the trade-off that the poorest people in society eat the food with the least nutritional content.

Sociology in the Workplace

Employers continue to seek people with what are called "transferable skills." This means that they want to hire people whose knowledge and education can be applied in a variety of settings and whose skills will contribute to various tasks. Studying sociology can provide people with this wide knowledge and a skill set that can contribute to many workplaces, including:

- An understanding of social systems and large bureaucracies;
- The ability to devise and carry out research projects to assess whether a program or policy is working;
- The ability to collect, read, and analyze statistical information from polls or surveys;
- The ability to recognize important differences in people's social, cultural, and economic backgrounds;
- Skill in preparing reports and communicating complex ideas; and
- The capacity for critical thinking about social issues and problems that confront modern society (Department of Sociology, University of Alabama).

Sociology prepares people for a wide variety of careers. Besides actually conducting social research or training others in the field, people who graduate from college with a degree in sociology are hired by government agencies, nongovernmental organizations, and corporations in fields such as social services, counseling (e.g., family planning, career, substance abuse), designing and evaluating social policies and programs, health services, polling and independent research, market research, and human resources management. Even a small amount of training in sociology can be an asset in careers like sales, public relations, journalism, teaching, law, and criminal justice.

Key Terms

AGIL schema: Talcott Parsons' division of society into four functional requisites: Adaptation, Goal attainment, Integration, and Latent pattern maintenance.

anomie: A social condition or normlessness in which a lack of clear norms fails to give direction and purpose to individual actions.

capitalism: An economic system characterized by private or corporate ownership and production of goods and their sale in a competitive market.

content: The specific reasons or drives that motivate individuals to interact.

critical sociology: A theoretical perspective that focuses on inequality and power relations in society in order to achieve social justice and emancipation through their transformation.

culture: Includes the group's shared practices, values, beliefs, norms and artifacts.

dialectics: A type of analysis that proposes that social contradiction, opposition and struggle in society drive processes of social change and transformation.

disenchantment of the world: The replacement of magical thinking by technological rationality and calculation.

dominant gender ideology: The belief that physiological sex differences between males and females are related to differences in their character, behaviour, and ability.

dual consciousness: The experience of a fissure or dividing point in everyday life where one crosses a line between irreconcilable forms of consciousness or perspective.

dynamic equilibrium: A stable state in which all parts of a healthy society are working together properly.

dysfunctions: Social patterns that have undesirable consequences for the operation of society.

empiricism: The philosophical tradition that seeks to discover the laws of the operation of the world through careful, methodical, and detailed observation.

egoistic suicide: Suicide which results from the absence of strong social bonds tying the individual to a community.

feminism: The critical analysis of the way gender differences in society structure social inequality.

figuration: The process of simultaneously analyzing the behaviour of an individual and the society that shapes that behaviour.

formal sociology: A sociology that analytically separates the contents from the forms of social interaction to study the common forms that guide human behaviour.

function: The part a recurrent activity plays in the social life as a whole and the contribution it makes to structural continuity.

functionalism (functionalist perspective): A theoretical approach that sees society as a structure with interrelated parts designed to meet the biological and social needs of individuals that make up that society.

global-level sociology: The study of structures and processes that extend beyond the boundaries of states or specific societies.

historical materialism: An approach to understanding society that explains social change, human ideas, and social organization in terms of underlying changes in the economic (or material) structure of society.

interpretive sociology: A perspective that explains human behaviour in terms of the meanings individuals attribute to it.

labelling: A social process in which an individual's social identity is established through the imposition of a definition by authorities.

latent functions: The unrecognized or unintended consequences of a social process.

macro-level sociology: The study of society-wide social structures and processes.

manifest functions: Sought consequences of a social process.

micro-level sociology: The study of specific relationships between individuals or small groups.

mode of production: The way human societies act upon their environment and its resources in order to use them to meet their needs.

multi-perspectival science: A science that is divided into competing or diverse paradigms.

paradigms: Philosophical and theoretical frameworks used within a discipline to formulate theories, generalizations, and the experiments performed in support of them.

patriarchy: Institutions of male power in society.

positive stage: A stage of social evolution in which people explain events in terms of scientific principles and laws.

positivism (positivist perspective or positivist sociology): The scientific study of social patterns based on methodological principles of the natural sciences.

quantitative sociology: Statistical methods such as surveys with large numbers of participants.

rationalization: The general tendency of modern institutions and most areas of life to be transformed by the application of instrumental reason.

Rationalism: The philosophical tradition that seeks to determine the underlying laws that govern the truth of reason and ideas.

reification: Referring to abstract concepts, complex processes or mutable social relationships as "things."

social action: Actions to which individuals attach *subjective* meanings.

social facts: The external laws, morals, values, religious beliefs, customs, fashions, rituals, and cultural rules that govern social life.

social reform: An approach to social change that advocates slow, incremental improvements in social institutions rather than rapid, revolutionary change of society as a whole.

social solidarity: The social ties that bind a group of people together such as kinship, shared location, and religion.

society: A group of people whose members interact, reside in a definable area, and share a culture.

sociological imagination: The ability to understand how your own unique circumstances relate to that of other people, as well as to history in general and societal structures in particular.

sociology: The systematic study of society and social interaction.

standpoint theory: The examination of how society is organized and coordinated from the perspective of a particular social location or perspective in society.

structural functionalism: see *functionalism.*

structure: General patterns that persist through time and become habitual or routinized at micro-levels of interaction, or institutionalized at macro or global levels of interaction.

symbolic interactionism: A theoretical perspective through which scholars examine the relationship of individuals within their society by studying their communication (language and symbols).

theory: A proposed explanation about social interactions or society.

Verstehen: German for "understanding"; in sociology it refers to the use of empathy, or putting oneself in another's place; to understand the motives and logic of another's action.

Section Summary

1.1. What Is Sociology?

Sociology is the systematic study of society and social interaction. In order to carry out their studies, sociologists identify cultural patterns and social forces and determine how they affect individuals and groups. They also develop ways to apply their findings to the real world.

1.2. The History of Sociology

Sociology was developed as a way to study and try to understand the changes to society brought on by the Industrial Revolution in the 18th and 19th centuries. Some of the earliest sociologists thought that societies and individuals' roles in society could be studied using the same scientific methodologies that were used in the natural sciences, while others believed that is was impossible to predict human behaviour scientifically, and still others debated the value of such predictions. Those perspectives continue to be represented within sociology today.

1.3. Theoretical Perspectives

Sociologists develop theories to explain social events, interactions, and patterns. A theory is a proposed explanation of those patterns. Theories have different scales. Macro-level theories, such as structural functionalism and conflict theory, attempt to explain how societies operate as a whole. Micro-level theories, such as symbolic interactionism, focus on interactions between individuals.

1.4. Why Study Sociology?

Studying sociology is beneficial both for the individual and for society. By studying sociology people learn how to think critically about social issues and problems that confront our society. The study of sociology enriches students' lives and

prepares them for careers in an increasingly diverse world. Society benefits because people with sociological training are better prepared to make informed decisions about social issues and take effective action to deal with them.

Section Quiz

1.1. What Is Sociology?

1. Which of the following best describes sociology as a subject?

    1. the study of individual behaviour
    2. the study of cultures
    3. the study of society and social interaction
    4. the study of economics

2. Wright Mills once said that sociologists need to develop a sociological _____ to study how society affects individuals.

    1. culture
    2. imagination
    3. method
    4. tool

3. A sociologist defines society as a group of people who reside in a defined area, share a culture, and who:

    1. interact.
    2. work in the same industry.
    3. speak different languages.
    4. practise a recognized religion.

4. Seeing patterns means that a sociologist needs to be able to:

    1. compare the behaviour of individuals from different societies.
    2. compare one society to another.
    3. identify similarities in how social groups respond to social pressure.
    4. compare individuals to groups.

1.2. The History of Sociology

5. Which of the following was a topic of study in early sociology?

    1. astrology
    2. economics
    3. physics
    4. history

6. Which founder of sociology believed societies changed due to class struggle?

    1. Émile Comte
    2. Karl Marx
    3. Plato
    4. Herbert Spencer

7. The difference between positivism and interpretive sociology relates to:

1. whether individuals like or dislike their society.
2. whether research methods use statistical data or person-to-person research.
3. whether sociological studies can predict or improve society.
4. all of the above.

8. Which would a quantitative sociologists use to gather data?

1. a large survey
2. a literature search
3. an in-depth interview
4. a review of television programs

9. Weber believed humans could not be studied purely objectively because they were influenced by:

1. drugs.
2. their culture.
3. their genetic makeup.
4. the researcher.

1.3. Theoretical Perspectives

10. Which of these theories is most likely to look at the social world on a micro-level?

1. structural functionalism
2. conflict theory
3. positivism
4. symbolic interactionism

11. Who believed that the history of society was one of class struggle?

1. Émile Durkheim
2. Karl Marx
3. Erving Goffmann
4. George Herbert Mead

12. Who coined the phrase symbolic interactionism?

1. Herbert Blumer
2. Max Weber
3. Lester F. Ward
4. W. I. Thomas

13. A symbolic interactionist may compare social interactions to:

1. behaviours.
2. conflicts.
3. human organs.
4. theatrical roles.

14. Which research technique would most likely be used by a symbolic interactionist?

1. surveys

2. participant observation
3. quantitative data analysis
4. none of the above

15. Which sociologist described sociology as the study of social forms?

1. Martineau
2. Simmel
3. Weber
4. Becker

1.4. Why Study Sociology?

16. Studying Sociology helps people analyze data because they learn:

1. interview techniques.
2. to apply statistics.
3. to generate theories.
4. all of the above.

17. Berger describes sociologists as concerned with:

1. monumental moments in people's lives.
2. common everyday life events.
3. both a and b.
4. none of the above.

[Quiz answers at the end of the chapter]

Short Answer

1.1. What Is Sociology?

1. What do you think C. Wright Mills meant when he said that to be a sociologist, one had to develop a sociological imagination?
2. Describe a situation in which a choice you made was influenced by societal pressures.

1.2. The History of Sociology

1. What do you make of Karl Marx's contributions to sociology? What perceptions of Marx have you been exposed to in your society, and how do those perceptions influence your views?
2. Do you tend to place more value on qualitative or quantitative research? Why? Does it matter what topic is being studied?

1.3. Theoretical Perspectives

1. Which theory do you think better explains how societies operate — structural functionalism or conflict theory? Why?

2. Do you think the way people behave in social interactions is more due to the cause and effect of external social constraints or more like actors playing a role in a theatrical production? Why?

1.4. Why Study Sociology?

1. How do you think taking a sociology course might affect your social interactions?
2. What sort of career are you interested in? How could studying sociology help you in this career

Further Research

1.1. What Is Sociology?

Sociology is a broad discipline. Different kinds of sociologists employ various methods for exploring the relationship between individuals and society. Check out more about sociology: http://www.sociologyguide.com/questions/sociological-approach.php.

1.2. The History of Sociology

Many sociologists helped shape the discipline. Learn more about prominent sociologists and how they changed sociology: http://www.macionis.com/resources-for-change/profiles-of-powerful-sociologists/.

1.3. Theoretical Perspectives

People often think of all conflict as violent, but many conflicts can be resolved nonviolently. To learn more about nonviolent methods of conflict resolution check out the Albert Einstein Institution: http://openstaxcollege.org/l/ae-institution.

1.4. Why Study Sociology?

For a nominal fee, the Canadian Sociological Association has produced an informative pamphlet "Opportunities in Sociology" which includes sections on: (1) The unique skills that set sociology apart as a discipline; (2) An overview of the Canadian labour market and the types of jobs available to Sociology BA graduates; (3) An examination of how sociology students can best prepare themselves for the labour market; (4) An introduction, based on sociological research, of the most fruitful ways to conduct a job search: https://www.fedcan-association.ca/event/en/33/91.

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Solutions to Section Quiz

1 C, | 2 B, | 3 A, | 4 C, | 5 B, | 6 B, | 7 C, | 8 A, | 9 B, | 10 D, | 11 B, | 12 A, | 13 D, | 14 B, | 15 B, | 16 D, | 17 C [Return to Quiz]

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Figure 1.4 "Native Pride" (photo courtesy of Rap Dictionary http://62.193.220.29/Native_syndicate)

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Figure 1.19. Hon. T.C. Douglas, Premier of Saskatchewan by Lieut. G. Barry Gilroy (http://en.wikipedia.org/wiki/File:Tommycropped.jpg) is in public domain.

Long Descriptions

Figure 1.16 Long Description: The Highland Clearances: A painting of men, women, and children looking upset and weary and surrounded by their belongings next to the ocean. Return to Figure 1.16

Figure 1.18 Long Description: Sociologists are placed into quadrants based on whether they privilege structure over agency or see society governed by normative vs. conflictual means.

	Normative	**Conflictual**
Structure	Comte's Positivism and Durkheim's Structural Functionalism	Foucault's Poststructuralism
Agency	Weber's Interpretive Sociology and Mead's Symbolic Interactionism	Martineau's Feminism and Marx's Critical Sociology

[Return to Figure 1.18]

Chapter 2. Sociological Research



Figure 2.1. Ottawa map showing the sites of the October 22, 2014 attack on Parliament Hill by Michael Zehaf-Bibeau. One was the National War Memorial and the other the Centre Block parliament building. What social factors led to the process of radicalization and political violence? How do sociologists study these questions? (Courtesy of User:Veggies/Wikimedia Commons)

Learning Objectives

2.1. Approaches to Sociological Research

- Define and describe the scientific method.
- Explain how the scientific method is used in sociological research.
- Understand the difference between positivist and interpretive approaches to the scientific method in sociology.
- Define what reliability and validity mean in a research study.

2.2. Research Methods

- Differentiate between four kinds of research methods: surveys, experiments, field research, and secondary data or textual analysis.
- Understand why certain topics are better suited to different research approaches.

2.3. Ethical Concerns

- Understand why ethical standards exist.
- Demonstrate awareness of the Canadian Sociological Association's Code of Ethics.
- Define value neutrality, and outline some of the issues of value neutrality in sociology.

Introduction to Sociological Research

In an unfortunate comment following the Boston Marathon bombing in April 2013, the then Prime Minister Stephen Harper said "this is not a time to commit sociology." He implied that the "utter condemnation of this kind of violence" *precluded* drawing on sociological research into the causes of political violence (Cohen, 2013). In his [Harper's] position, there is a disjunction between taking a strong political and moral stance on violence on one hand and working towards

a deeper, evidence-based understanding of the social causes of acts of violence on the other. Behind the political and moral rhetoric of Stephen Harper's statement are a number of densely solidified beliefs about the nature of a "terrorist" individual — "people who have agendas of violence that are deep and abiding, [who] are a threat to all the values that our society stands for" (Cohen, 2013). In this framework, the terrorist is a kind of person who is beyond reason and morality. Therefore, sociological analysis is not only futile in the former Prime Minister's opinion but also, for the same reasons, contrary to the "utter determination through our laws and through our activities to do everything we can to prevent and counter [terrorist violence]" (Cohen, 2013).



Figure 2.2. The film Paradise Now (2005) tells the story of two friends who are recruited for a suicide bombing mission in Israel (Courtesy of דוד שי*/Wikimedia Commons)*

However, in the research of Robert Pape (2005) a different picture of the terrorist emerges. In the case of the 462 suicide bombers Pape studied, not only were the suicide bombers relatively well educated and affluent, but as other studies of suicide bombers in general confirm, they were not mentally imbalanced *per se*, not blindly motivated by religious zeal, and not unaffected by the moral ambivalence of their proposed acts. They were ordinary individuals caught up in extraordinary circumstances. How would this understanding of the terrorist individual affect the drafting of public policy and public responses to terrorism?

Sociological research is especially important with respect to public policy debates. The political controversies that surround the question of how best to respond to terrorism and violent crime are difficult to resolve at the level of political rhetoric. Often, in the news and in public discourse, the issue is framed in moral terms and therefore, for example, the policy alternatives get narrowed to the option of either being "tough" or "soft" on crime. Tough and soft are moral categories that reflect a moral characterization of the issue. A question framed by these types of moral categories cannot be resolved using evidence-based procedures. Posing the debate in these terms narrows the range of options available and undermines the ability to raise questions about what responses to crime actually work.

In fact policy debates over terrorism and crime seem especially susceptible to the various forms of specious, unscientific reasoning described later in this chapter. The story of the isolated individual, whose specific act of violence becomes the basis for the belief that the criminal justice system as a whole has failed, illustrates several qualities of unscientific thinking: knowledge based on casual observation, knowledge based on over-generalization, and knowledge based on selective evidence. The sociological approach to policy questions is essentially different since it focuses on examining the effectiveness of different social control strategies for addressing different types of violent behaviour and the different types of risk to public safety. Thus, from a sociological point of view, it is crucial to think systematically about who commits violent acts and why.

Although moral claims and opinions are of interest to sociologists, sociological researchers use **empirical evidence**

(that is, evidence corroborated by direct experience and/or observation) combined with the **scientific method** to deliver sound sociological research. A truly scientific sociological study of the social causes that lead to terrorist or criminal violence would involve a sequence of prescribed steps: defining a specific research question that can be answered through empirical observation; gathering information and resources through detailed observation; forming a hypothesis; testing the hypothesis in a reproducible manner; analyzing and drawing conclusions from the data; publishing the results; and anticipating further development when future researchers respond to and re-examine the findings.

An appropriate starting point in this case might be the question "What are the social conditions of individuals who are drawn to commit terrorist acts?" In a casual discussion of the issue, or in the back and forth of Twitter or news comment forums, people often make arguments based on their personal observations and insights, believing them to be accurate. But the results of casual observation are limited by the fact that there is no standardization—who is to say if one person's observation of an event is any more accurate than another's? To mediate these concerns, sociologists rely on systematic research processes.

The unwillingness to "commit sociology" and think more deeply about the roots of political violence might lead to a certain moral or rhetorical image of an "uncompromising" response to the "terrorist threat," but not a response that has proven effective in practice nor one that exhausts the options for preventing and countering acts of political violence. Contrary to the former Prime Minister's statements, the aftermath of the Boston Marathon bombing is precisely a moment to commit sociology if the issues that produce acts of violence are to be addressed.

2.1. Approaches to Sociological Research



Figure 2.3. Sherlock Holmes, known for his keen observational skills (Photo courtesy of Special Collections Toronto Public Library/ Wikimedia Commons)

When sociologists apply the sociological perspective and begin to ask questions, no topic is off limits. Every aspect of human behaviour is a source of possible investigation. Sociologists question the world that humans have created and live in. They notice patterns of behaviour as people move through the world. Using sociological methods and systematic research within the framework of the scientific method, sociologists have discovered workplace patterns that have transformed industries, family patterns that have enlightened parents, and education patterns that have aided structural changes in classrooms.

Depending on the focus and the type of research conducted, sociological findings could be useful in addressing any of the three basic interests or purposes of sociological knowledge we discussed in the last chapter: the positivist interest in quantitative factual evidence to determine effective social policy decisions, the interpretive interest in understanding

the meanings of human behaviour to foster mutual understanding and consensus, and the critical interest in knowledge useful for challenging power relations and emancipating people from conditions of servitude. It might seem strange to use scientific practices to study social phenomena but, as we have argued above, it is extremely helpful to rely on systematic approaches that research methods provide.

Sociologists often begin the research process by asking a question about how or why things happen. It might be a unique question about a new trend or an old question about a common aspect of life. Once a question is formed, a sociologist proceeds through an in-depth process to answer it. Depending on the nature of the topic and the goals of the research, sociologists have a variety of methodologies to choose from. In particular, in deciding how to design that process, the researcher may adopt a **positivist methodology** or an **interpretive methodology**. Both types of methodology can be useful for **critical research strategies**. The following sections describe these approaches to acquiring knowledge.

Science vs. Non-Science

We live in an interesting time in which the certitudes and authority of science are frequently challenged. In the natural sciences, people doubt scientific claims about climate change and the safety of vaccines. In the social sciences, people doubt scientific claims about the declining rate of violent crime or the effectiveness of needle exchange programs. Sometimes there is a good reason to be skeptical about science, when scientific technologies prove to have adverse effects on the environment, for example; sometimes skepticism has dangerous outcomes, when epidemics of diseases like measles suddenly break-out in schools due to low vaccination rates. In fact, skepticism is central to both natural and social sciences, but from a scientific point of view the skeptical attitude needs to be combined with systematic research in order for knowledge to move forward.

In sociology, science provides the basis for being able to distinguish between everyday opinions or beliefs and propositions that can be sustained by evidence. In his paper *The Normative Structure of Science* (1942/1973) the sociologist Robert Merton argued that science is a type of empirical knowledge organized around four key principles, often referred to by the acronym CUDOS:

> 1. Communalism: The results of science must be made available to the public; science is freely available, shared knowledge open to public discussion and debate.
> 2. Universalism: The results of science must be evaluated based on universal criteria, not parochial criteria specific to the researchers themselves.
> 3. Disinterestness: Science must not be pursued for private interests or personal reward.
> 4. Organized Skepticism: The scientist must abandon all prior intellectual commitments, critically evaluate claims, and postpone conclusions until sufficient evidence has been presented; scientific knowledge is provisional.

For Merton, therefore, non-scientific knowledge is knowledge that fails in various respects to meet these criteria. Types of esoteric or mystical knowledge, for example, might be valid for someone on a spiritual path, but because this knowledge is passed from teacher to student and it is not available to the public for open debate, or because the validity of this knowledge might be specific to the individual's unique spiritual configuration, esoteric or mystical knowledge is not scientific *per se*. Claims that are presented to persuade (rhetoric), to achieve political goals (propaganda, of various sorts), or to make profits (advertising) are not scientific because these claims are structured to satisfy private interests. Propositions which fail to stand up to rigorous and systematic standards of evaluation are not scientific because they can not withstand the criteria of organized skepticism and scientific method.

The basic distinction between scientific and common, non-scientific claims about the world is that in science "seeing is believing" whereas in everyday life "believing is seeing" (Brym, Roberts, Lie, & Rytina, 2013). Science is in crucial respects based on systematic observation following the principles of CUDOS. Only on the basis of observation (or "seeing") can a scientist believe that a proposition about the nature of the world is correct. Research methodologies are designed to reduce the chance that conclusions will be based on error. In everyday life, the order is typically reversed. People "see" what they already expect to see or what they already believe to be true. Prior intellectual commitments or biases predetermine what people observe and the conclusions they draw.

Many people know things about the social world without having a background in sociology. Sometimes their

knowledge is valid; sometimes it is not. It is important, therefore, to think about how people know what they know, and compare it to the scientific way of knowing. Four types of non-scientific reasoning are common in everyday life: knowledge based on casual observation, knowledge based on selective evidence, knowledge based on overgeneralization, and knowledge based on authority or tradition.

Table 2.1. Scientific and Non-Scientific Ways of Knowing (Source: Amy Blackstone, Sociological Inquiry Principles: Qualitative and Quantitative Methods. Creative Commons by-nc-sa 3.0 License)

Way of Knowing	Description
Casual Observation	Occurs when we make observations without any systematic process for observing or assessing the accuracy of what we observed.
Selective Observation	Occurs when we see only those patterns that we want to see, or when we assume that only the patterns we have experienced directly exist.
Overgeneralization	Occurs when we assume that broad patterns exist even when our observations have been limited.
Authority/Tradition	A socially defined source of knowledge that might shape our beliefs about what is true and what is not true.
Scientific Research Methods	An organized, logical way of learning and knowing about our social world.

Many people know things simply because they have experienced them directly. If you grew up in Manitoba you may have observed what plenty of kids learn each winter, that it really is true that one's tongue will stick to metal when it's very cold outside. Direct experience may get us accurate information, but only if we are lucky. Unlike the fictional detective Sherlock Holmes, in general we are not very careful observers. In this example, the observation process is not really deliberate or formal. Instead, you would come to know what you believe to be true through **casual observation**. The problem with casual observation is that sometimes it is right, and sometimes it is wrong. Without any systematic process for observing or assessing the accuracy of our observations, we can never really be sure if our informal observations are accurate.


The Call

A WINGED SHIP IN THE SKY.

It Cleaves the Air With Pinions Like a Huge Condor.

ALL SACRAMENTO SEES THE NEW WONDER.

The Inventor's Lawyer Describes the Machine and Says It Is Genuine.

IT WAS SEEN SOARING NEAR SAN JOSE AT MIDNIGHT.

LOSS OF THE SAN BENITO

Figure 2.4. "A Winged Ship in the Sky" seen by all in Sacramento in 1896 (Photo courtesy of Wikimedia Commons)

Many people know things because they overlook disconfirming evidence. Suppose a friend of yours declared that all men are liars shortly after she had learned that her boyfriend had deceived her. The fact that one man happened to lie to her in one instance came to represent a quality inherent in all men. But do *all* men really lie *all* the time? Probably not. If you prompted your friend to think more broadly about her experiences with men, she would probably acknowledge that she knew many men who, to her knowledge, had never lied to her and that even her boyfriend did not generally make a habit of lying. This friend committed what social scientists refer to as **selective observation** by noticing only the pattern that she wanted to find at the time. She ignored disconfirming evidence. If, on the other hand, your friend's experience with her boyfriend had been her only experience with any man, then she would have been committing what social scientists refer to as **overgeneralization**, assuming that broad patterns exist based on very limited observations.

Another way that people claim to know what they know is by looking to what they have always known to be true.

There is an urban legend about a woman who for years used to cut both ends off of a ham before putting it in the oven (Mikkelson, 2005). She baked ham that way because that is the way her mother did it, so clearly that was the way it was supposed to be done. Her knowledge was based on a family tradition (**traditional knowledge**). After years of tossing cuts of perfectly good ham into the trash, however, she learned that the only reason her mother cut the ends off ham before cooking it was that she did not have a pan large enough to accommodate the ham without trimming it.

Without questioning what we think we know is true, we may wind up believing things that are actually false. This is most likely to occur when an authority tells us that something is true (**authoritatve knowledge**). Our mothers are not the only possible authorities we might rely on as sources of knowledge. Other common authorities we might rely on in this way are the government, our schools and teachers, and churches and ministers. Although it is understandable that someone might believe something to be true if someone he or she looks up to or respects has said it is so, this way of knowing differs from the sociological way of knowing. Whether quantitative, qualitative, or critical in orientation, sociological research is based on the scientific method.

The last four paragraphs on the four types of non-scientific reasoning adapted from Amy Blackstone, *Sociological Inquiry Principles: Qualitative and Quantitative Methods (V. 1.0).* Used under Creative Commons by-nc-sa 3.0 License.

The Scientific Method

Sociologists make use of tried-and-true methods of research, such as experiments, surveys, field research, and textual analysis. But humans and their social interactions are so diverse that they can seem impossible to chart or explain. It might seem that science is about discoveries and chemical reactions or about proving hypotheses about elementary particles right or wrong rather than about exploring the nuances of human behaviour. However, this is exactly why scientific models work for studying human behaviour. A scientific process of research establishes parameters that help make sure results are objective and accurate. Scientific methods provide limitations and boundaries that focus a study and organize its results. This is the case for both positivist quantitative methodologies, which seek to translate observable phenomena into unambiguous numerical data, and interpretive qualitative methodologies, which seek to translate observable phenomena into definable units of meaning. The social scientific method in both cases involves developing and testing theories about the world based on empirical (i.e., observable) evidence. The social scientific method is defined by its commitment to systematic observation of the social world, and it strives to be objective, critical, skeptical, and logical. It involves a series of established steps known as the **research cycle**.

However, just because sociological studies use the scientific method it does not make the results less human. Sociological topics like the causes and conditions of political violence are typically not amenable to the mathematical precision or quantifiable predictions of physics or chemistry. In the field of sociology, results of studies tend to provide people with access to knowledge they did not have before — knowledge of people's social conditions, knowledge of rituals and beliefs, knowledge of trends and attitudes. Nevertheless, no matter what research approach is used, researchers want to maximize the study's **reliability** (how likely research results are to be replicated if the study is reproduced). Reliability increases the likelihood that what is true of one person will be true of all people in a group. Researchers also want to maximize the study's **validity** (how well the study measures what it was designed to measure).

A subtopic in the field of political violence would be to examine the sources of homegrown radicalization: What are the conditions under which individuals in Canada move from a state of indifference or moderate concern with political issues to a state in which they are prepared to use violence to pursue political goals? The reliability of a study of radicalization reflects how well the social factors unearthed by the research represent the actual experience of political radicals. Validity ensures that the study's design accurately examined what it was designed to study. An exploration of an individual's propensity to plan or engage in violent acts or to go abroad to join a terrorist organization should address those issues and not confuse them with other themes such as why an individual adopts a particular faith or espouses radical political views. As research from the UK and United States has in fact shown, while jihadi terrorists typically identify with an Islamic world view, a well-developed Islamic identity counteracts jihadism. Similarly, research has shown that while it intuitively makes sense that people with radical views would adopt radical means like violence to achieve them, there is in fact no consistent homegrown terrorist profile, meaning that it is not possible to predict whether someone who espouses

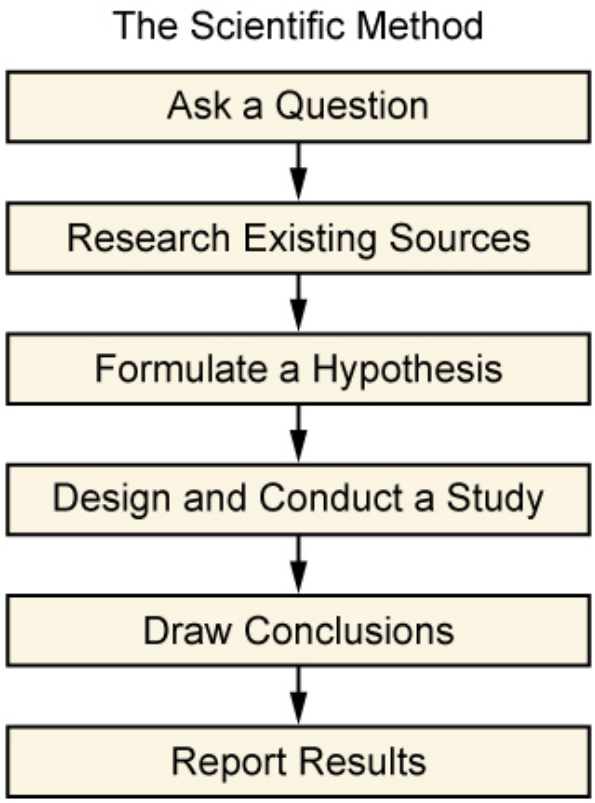


Figure 2.5. The research cycle passes through a series of steps. The conclusions and reporting typically generate a new set of questions, which renews the cycle. [Long Description]

radical views will move on to committing violent acts (Patel, 2011). To ensure validity, research on political violence should focus on individuals who engage in political violence.

Sociologists use the scientific method not only to collect but to interpret and analyze the data. They deliberately apply scientific logic and objectivity. They are interested in but not attached to the results. Their research work is independent of their own political or social beliefs. This does not mean researchers are not critical. Nor does it mean they do not have their own personalities, preferences, and opinions. But sociologists deliberately use the scientific method to maintain as much objectivity, focus, and consistency as possible in a particular study. With its systematic approach, the scientific method has proven useful in shaping sociological studies. The scientific method provides a systematic, organized series of steps that help ensure objectivity and consistency in exploring a social problem. These steps provide the means for accuracy, reliability, and validity. In the end, the scientific method provides a shared basis for discussion and analysis (Merton, 1949/1968). Typically, the scientific method starts with these steps, which are described below: 1) ask a question; 2) research existing sources; and 3) formulate a hypothesis.

Ask a Question

The first step of the scientific method is to ask a question, describe a problem, and identify the specific area of interest. The topic should be narrow enough to study within a geography and time frame. "Are societies capable of sustained happiness?" would be too vague. The question should also be broad enough to have universal merit. "What do personal hygiene habits reveal about the values of students at XYZ High School?" would be too narrow. That said, happiness and hygiene are worthy topics to study.

Sociologists do not rule out any topic, but would strive to frame these questions in better research terms. That is why sociologists are careful to define their terms. Karl Popper (1902–1994) described the formulation of scientific propositions in terms of the concept of **falsifiability** (1963). He argued that the key demarcation between scientific and non-scientific

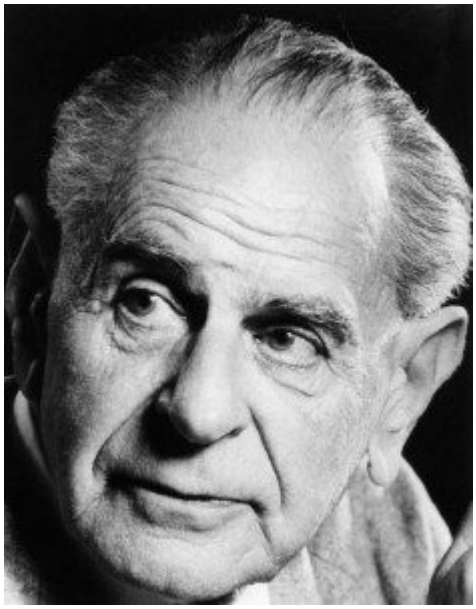


Figure 2.6. Karl Popper (Photo courtesy of Wikimedia Commons)

propositions was not ultimately their truth, nor their empirical verification, but whether or not they were stated in such a way as to be falsifiable; that is, whether a possible empirical observation could prove them wrong. If one claimed that evil spirits were the source of criminal behaviour, this would not be a scientific proposition because there is no possible way to definitively disprove it. Evil spirits cannot be observed. However, if one claimed that higher unemployment rates are the source of higher crime rates, this would be a scientific proposition because it is theoretically possible to find an instance where unemployment rates were not correlated to crime rates. As Popper said, "statements or systems of statements, in order to be ranked as scientific, must be capable of conflicting with possible, or conceivable, observations" (1963).

Once a proposition is formulated in a way that would permit it to be falsified, the variables to be observed need to be operationalized. In a hygiene study, for instance, hygiene could be defined as "personal habits to maintain physical appearance (as opposed to health)," and a researcher might ask, "How do differing personal hygiene habits reflect the cultural value placed on appearance?" When forming these basic research questions, sociologists develop an **operational definition**; that is, they define the concept in terms of the physical or concrete steps it takes to objectively measure it. The concept is translated into an observable **variable**, a measure that has different values. The operational definition identifies an observable condition of the concept.

By operationalizing a variable of the concept, all researchers can collect data in a systematic or replicable manner. The operational definition must be valid in the sense that it is an appropriate and meaningful measure of the concept being studied. It must also be reliable, meaning that results will be close to uniform when tested on more than one person. For example, good drivers might be defined in many ways: Those who use their turn signals; those who do not speed; or those who courteously allow others to merge. But these driving behaviours could be interpreted differently by different researchers, so they could be difficult to measure. Alternatively, "a driver who has never received a traffic violation" is a specific description that will lead researchers to obtain the same information, so it is an effective operational definition. Asking the question, "how many traffic violations has a driver received?" turns the concepts of "good drivers" and "bad drivers" into variables which might be measured by the number of traffic violations a driver has received. Of course the sociologist has to be wary of the way the variables are operationalized. In this example we know that black drivers are subject to much higher levels of police scrutiny than white drivers, so the number of traffic violations a driver has received might reflect less on their driving ability and more on the crime of "driving while black."

Research Existing Sources

The next step researchers undertake is to conduct background research through a **literature review**, which is a review of

any existing similar or related studies. A visit to a university library and a thorough online search will uncover existing research about the topic of study. This step helps researchers gain a broad understanding of work previously conducted on the topic at hand and enables them to position their own research to build on prior knowledge. It allows them to sharpen the focus of their research question and avoid duplicating previous research. Researchers — including student researchers — are responsible for correctly citing existing sources they use in a study or sources that inform their work. While it is fine to build on previously published material (as long as it enhances a unique viewpoint), it must be referenced properly and never plagiarized. To study hygiene and its value in a particular society, a researcher might sort through existing research and unearth studies about childrearing, vanity, obsessive-compulsive behaviours, and cultural attitudes toward beauty. It is important to sift through this information and determine what is relevant. Using existing sources educates a researcher and helps refine and improve a study's design.

Formulate a Hypothesis

A **hypothesis** is an assumption about how two or more variables are related; it makes a conjectural statement about the relationship between those variables. It is an educated guess because it is not random but based on theory, observations, patterns of experience, or the existing literature. The hypothesis formulates this guess in the form of a testable proposition. However, how the hypothesis is handled differs between the positivist and interpretive approaches. Positivist methodologies are often referred to as **hypothetico-deductive methodologies**. A hypothesis is derived from a theoretical proposition. On the basis of the hypothesis a prediction or generalization is logically deduced. In positivist sociology, the hypothesis predicts how one form of human behaviour influences another. How does being a black driver affect the number of times the police will pull you over?

Successful prediction will determine the adequacy of the hypothesis and thereby test the theoretical proposition. Typically positivist approaches operationalize variables as **quantitative data**; that is, by translating a social phenomenon like health into a quantifiable or numerically measurable variable like "number of visits to the hospital." This permits sociologists to formulate their predictions using mathematical language like regression formulas to present research findings in graphs and tables, and to perform mathematical or statistical techniques to demonstrate the validity of relationships.

Variables are examined to see if there is a **correlation** between them. When a change in one variable coincides with a change in another variable there is a correlation. This does not necessarily indicate that changes in one variable causes a change in another variable, however; just that they are associated. A key distinction here is between independent and dependent variables. In research, **independent variables** are the cause of the change. The **dependent variable** is the effect, or thing that is changed. For example, in a basic study, the researcher would establish one form of human behaviour as the independent variable and observe the influence it has on a dependent variable. How does gender (the independent variable) affect rate of income (the dependent variable)? How does one's religion (the independent variable) affect family size (the dependent variable)? How is social class (the dependent variable) affected by level of education (the independent variable)?

For it to become possible to speak about **causation**, three criteria must be satisfied:

- There must be a relationship or correlation between the independent and dependent variables.
- The independent variable must be prior to the dependent variable.
- There must be no other **intervening variable** responsible for the causal relationship.

It is important to note that while there has to be a correlation between variables for there to be a causal relationship, correlation does not necessarily imply causation. The relationship between variables can be the product of a third intervening variable that is independently related to both. For example, there might be a positive relationship between wearing bikinis and eating ice cream, but wearing bikinis does not cause eating ice cream. It is more likely that the heat of summertime causes both an increase in bikini wearing and an increase in the consumption of ice cream.

The distinction between causation and correlation can have significant consequences. For example, Aboriginal Canadians are overrepresented in prisons and arrest statistics. As we noted in Chapter 1, in 2013 Aboriginal people accounted for about 4 percent of the Canadian population, but they made up 23.2 percent of the federal penitentiary population (Correctional Investigator Canada, 2013). There is a positive correlation between being an Aboriginal person in Canada and being in jail. Is this because Aboriginal people are racially or biologically predisposed to crime? No. In fact there are at least four intervening variables that explain the higher incarceration of Aboriginal people (Hartnagel,

2004): Aboriginal people are disproportionately poor and poverty is associated with higher arrest and incarceration rates; Aboriginal lawbreakers tend to commit more detectable "street" crimes than the less detectable "white collar" crimes of other segments of the population; the criminal justice system disproportionately profiles and discriminates against Aboriginal people; and the legacy of colonization has disrupted and weakened traditional sources of social control in Aboriginal communities.

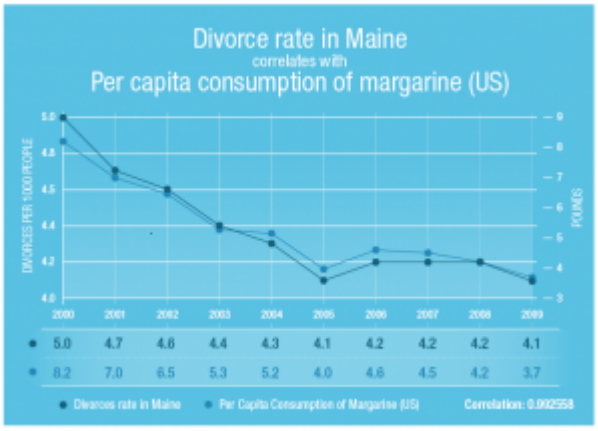


Figure 2.7. Correlation does not imply causation (Image courtesy of AltimeterGroup/Flickr)

Table 2.2. Examples of Dependent and Independent Variables. Typically, the Independent Variable Causes the Dependent Variable to Change in Some Way.

Hypothesis	Variable	Dependent Variable
The greater the availability of affordable housing, the lower the homeless rate.	Affordable Housing	Homeless Rate
The greater the availability of math tutoring, the higher the math grades.	Math Tutoring	Math Grades
The greater the police patrol presence, the safer the neighbourhood.	Police Patrol Presence	Safer Neighbourhood
The greater the factory lighting, the higher the productivity.	Factory Lighting	Productivity
The greater the amount of public auditing, the lower the amount of political dishonesty.	Auditing	Political Dishonesty

At this point, a researcher's **operational definitions** help measure the variables. In a study asking how tutoring improves grades, for instance, one researcher might define "good" grades as a C or better, while another uses a B+ as a starting point for good. Another operational definition might describe "tutoring" as "one-on-one assistance by an expert in the field, hired by an educational institution." Those definitions set limits and establish cut-off points, ensuring consistency and replicability in a study. As the chart shows, an independent variable is the one that causes a dependent variable to change. For example, a researcher might hypothesize that teaching children proper hygiene (the independent variable) will boost their sense of self-esteem (the dependent variable). Or rephrased, a child's sense of self-esteem depends, in part, on the quality and availability of hygienic resources.

Of course, this hypothesis can also work the other way around. Perhaps a sociologist believes that increasing a child's sense of self-esteem (the independent variable) will automatically increase or improve habits of hygiene (now the dependent variable). Identifying the independent and dependent variables is very important. As the hygiene example shows, simply identifying two topics, or variables, is not enough: Their prospective relationship must be part of the hypothesis. Just because a sociologist forms an educated prediction of a study's outcome doesn't mean data contradicting the hypothesis are not welcome. Sociologists analyze general patterns in response to a study, but they are equally interested in exceptions to patterns.

In a study of education, a researcher might predict that high school dropouts have a hard time finding a rewarding career. While it has become at least a cultural assumption that the higher the education, the higher the salary and degree

of career happiness, there are certainly exceptions. People with little education have had stunning careers, and people with advanced degrees have had trouble finding work. A sociologist prepares a hypothesis knowing that results will vary.

Hypothesis Formation in Qualitative Research

While many sociologists rely on the positivist hypothetico-deductive method in their research, others operate from an **interpretive approach**. While still systematic, this approach typically does not follow the hypothesis-testing model that seeks to make generalizable predictions from quantitative variables. Instead, an interpretive framework seeks to understand social worlds from the point of view of participants, leading to in-depth knowledge. It focuses on **qualitative data,** or the meanings that guide people's behaviour. Rather than relying on quantitative instruments, like fixed questionnaires or experiments, which can be artificial, the interpretive approach attempts to find ways to get closer to the informants' lived experience and perceptions.

Interpretive research is generally more descriptive or narrative in its findings than positivist research. It can begin from a deductive approach by deriving a hypothesis from theory and then seeking to confirm it through methodologies like in-depth interviews. However, it is ideally suited to an **inductive approach** in which the hypothesis emerges only after a substantial period of direct observation or interaction with subjects. This type of approach is exploratory in that the researcher also learns as he or she proceeds, sometimes adjusting the research methods or processes midway to respond to new insights and findings as they evolve.

For example, Glaser and Strauss' (1967) classic elaboration of grounded theory proposed that qualitative researchers working with rich sources of qualitative data from interviews or ethnographic observations need to go through several stages of coding the data before a strong theory of the social phenomenon under investigation can emerge. In the initial stage, the researcher is simply trying to categorize and sort the data. The researchers do not predetermine what the relevant categories of the social experience are but analyze carefully what their subjects actually say. For example, what are the working definitions of health and illness that hospital patients use to describe their situation? In the first stage, the researcher tries to label the common themes emerging from the data: different ways of describing health and illness. In the second stage, the researcher takes a more analytical approach by organizing the data into a few key themes: perhaps the key assumptions that lay people make about the physiological mechanisms of the body, or the metaphors they use to describe their relationship to illness (e.g., a battle, a punishment, a message, etc.). In the third stage, the researcher would return to the interview subjects with a new set of questions that would seek to either affirm, modify, or discard the analytical themes derived from the initial coding of the interviews. This process can then be repeated until a thoroughly grounded theory is ready to be proposed. At every stage of the research, the researchers are obliged to follow the emerging data by revising their conceptions as new material is gathered, contradictions accounted for, commonalities categorized, and themes re-examined with further interviews.

Once the preliminary work is done and the hypothesis defined, it is time for the next research steps: choosing a research methodology, conducting a study, and drawing conclusions. These research steps are discussed below.

Making Connections: Classic Sociologists

Harriet Martineau: The First Woman Sociologist?

As was noted in Chapter 1, Harriet Martineau (1802–1876) was one of the first women sociologists in the 19th century. Particularly innovative was her early work on sociological methodology, *How to Observe Manners and Morals* (1838). In this volume she developed the ground work for a systematic social-scientific approach to studying human behaviour. She recognized that the issues of the researcher — subject relationship would have to be addressed differently in a social science as opposed to a natural science. The observer, or "traveller," as she put it, needed to respect three criteria to obtain valid research: impartiality, critique, and sympathy. The impartial observer could not allow herself to be "perplexed or disgusted" by foreign practices that she could not personally reconcile herself with. Yet at the same time she saw the goal of sociology to be the fair but critical assessment of the moral status of a culture. In particular, the goal of sociology was to challenge forms of racial, sexual, or class domination in the name of autonomy: the right of



Figure 2.8. Harriet Martineau. Painting by Richard Evans (1834) . (Photo courtesy of National Portrait Gallery, London/ Wikimedia Commons)

every person to be a "self-directing moral being." Finally, what distinguished the science of social observation from the natural sciences was that the researcher had to have unqualified sympathy for the subjects being studied (Lengermann & Niebrugge, 2007). This later became a central principle of Max Weber's interpretive sociology, although it is not clear that Weber read Martineau's work.

A large part of her research in the United States analyzed the situations of contradiction between stated public morality and actual moral practices. For example, she was fascinated with the way that the formal democratic right to free speech enabled slavery abolitionists to hold public meetings, but when the meetings were violently attacked by mobs, the abolitionists and not the mobs were accused of inciting the violence (Zeitlin, 1997). This emphasis on studying contradictions followed from the distinction she drew between morals — society's collective ideas of permitted and forbidden behaviour — and manners — the actual patterns of social action and association in society. As she realized the difficulty in getting an accurate representation of an entire society based on a limited number of interviews, she developed the idea that one could identify key "Things" experienced by all people — age, gender, illness, death, etc. — and examine how they were experienced differently by a sample of people from different walks of life (Lengermann & Niebrugge, 2007). Martineau's sociology, therefore, focused on surveying different attitudes toward "Things" and studying the anomalies that emerged when manners toward them contradicted a society's formal morals.

2.2. Research Methods

Sociologists examine the world, see a problem or interesting pattern, and set out to study it. They use research methods to design a study — perhaps a positivist, quantitative method for conducting research and obtaining data, or perhaps an ethnographic study utilizing an interpretive framework. Planning the **research design** is a key step in any sociological study. When entering a particular social environment, a researcher must be careful. There are times to remain anonymous and times to be overt. There are times to conduct interviews and times to simply observe. Some participants need to be thoroughly informed; others should not know that they are being observed. A researcher would not stroll into a crime-ridden neighbourhood at midnight, calling out, "Any gang members around?" And if a researcher walked into a coffee shop and told the employees they would be observed as part of a study on work efficiency, the self-conscious, intimidated

baristas might not behave naturally. The unique nature of human research subjects is that they can react to the researcher and change their behaviour under observation.

Making Connections: Sociological Research

The Hawthorne Effect



Figure 2.9. Hawthorne Works factory of the Western Electric Company, 1925.

In the 1920s, leaders of a Chicago factory called Hawthorne Works commissioned a study to determine whether or not changing certain aspects of working conditions could increase or decrease worker productivity. Sociologists were surprised when the productivity of a test group increased when the lighting of their workspace was improved. They were even more surprised when productivity improved when the lighting of the workspace was dimmed. In fact almost every change of independent variable — lighting, breaks, work hours — resulted in an improvement of productivity. But when the study was over, productivity dropped again.

Why did this happen? In 1953, Henry A. Landsberger analyzed the study results to answer this question. He realized that employees' productivity increased because sociologists were paying attention to them. The sociologists' presence influenced the study results. Worker behaviours were altered not by the lighting but by the study itself. From this, sociologists learned the importance of carefully planning their roles as part of their research design (Franke & Kaul, 1978). Landsberger called the workers' response the **Hawthorne effect —** people changing their behaviour because they know they are being watched as part of a study.

The Hawthorne effect is unavoidable in some research. In many cases, sociologists have to make the purpose of the study known for ethical reasons. Subjects must be aware that they are being observed, and a certain amount of artificiality may result (Sonnenfeld, 1985). Making sociologists' presence invisible is not always realistic for other reasons. That option is not available to a researcher studying prison behaviours, early education, or the Ku Klux Klan. Researchers cannot just stroll into prisons, kindergarten classrooms, or Ku Klux Klan meetings and unobtrusively observe behaviours. In situations like these, other methods are needed. All studies shape the research design, while research design simultaneously shapes the study. Researchers choose methods that best suit their study topic and that fit with their overall goal for the research.

In planning a study's design, sociologists generally choose from four widely used methods of social investigation: survey, experiment, field research, and textual or secondary data analysis (or use of existing sources). Every research method comes with pluses and minuses, and the topic of study strongly influences which method or methods are put to use.

1. Surveys

As a research method, a **survey** collects data from subjects who respond to a series of questions about behaviours and opinions, often in the form of a written questionnaire. The survey is one of the most widely used sociological research methods. The standard survey format allows individuals a level of anonymity in which they can express personal ideas.

At some point or another, everyone responds to some type of survey. The Statistics Canada census is an excellent example of a large-scale survey intended to gather sociological data. Customers also fill out questionnaires at stores or promotional

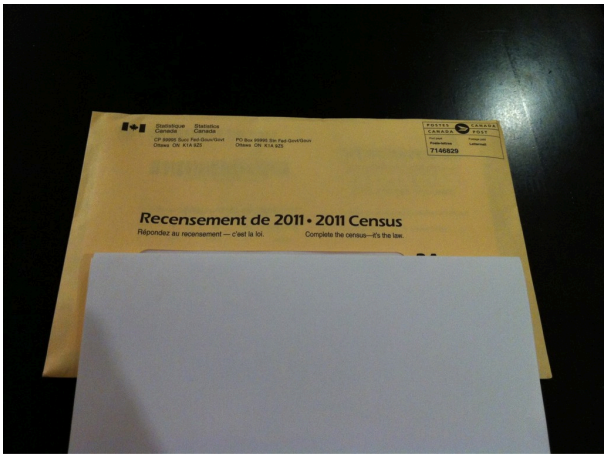


Figure 2.10. Questionnaires are a common research method. The Statistics Canada census is a well-known example. (Photo courtesy of Khosrow Ebrahimpour/Flickr)

events, responding to questions such as "How did you hear about the event?" and "Were the staff helpful?" You have probably picked up the phone and heard a caller ask you to participate in a political poll or similar type of survey: "Do you eat hot dogs? If yes, how many per month?" Not all surveys would be considered sociological research. Marketing polls help companies refine marketing goals and strategies; they are generally not conducted as part of a scientific study, meaning they are not designed to test a hypothesis or to contribute knowledge to the field of sociology. The results are not published in a refereed scholarly journal where design, methodology, results, and analyses are vetted.

Often, polls on TV do not reflect a general population, but are merely answers from a specific show's audience. Polls conducted by programs such as *American Idol* or *Canadian Idol* represent the opinions of fans but are not particularly scientific. A good contrast to these are the Bureau of Broadcast Measurement (BBM) (now called Numeris) ratings, which determine the popularity of radio and television programming in Canada through scientific market research. Their researchers ask a large random sample of Canadians, age 12 and over, to fill out a television or radio diary for one week, noting the times and the broadcasters they listened to or viewed. Based on this methodology they are able to generate an accurate account of media consumers preferences, which are used to provide broadcast ratings for radio and television stations and define the characteristics of their core audiences.

Sociologists conduct surveys under controlled conditions for specific purposes. Surveys gather different types of information from people. While surveys are not great at capturing the ways people really behave in social situations, they are a great method for discovering how people feel and think — or at least how they say they feel and think. Surveys can track attitudes and opinions, political preferences, individual behaviours such as sleeping, driving, dietary, or texting habits, or factual information such as employment status, income, and education levels. A survey targets a specific **population**, people who are the focus of a study, such as university athletes, international students, or teenagers living with type 1 (juvenile-onset) diabetes.

Most researchers choose to survey a small sector of the population, or a **sample**: That is, a manageable number of subjects who represent a larger population. The success of a study depends on how well a population is represented by the sample. In a **random sample**, every person in a population has the same chance of being chosen for the study. According to the laws of probability, random samples represent the population as a whole. The larger the sample size, the more accurate the results will be in characterizing the population being studied. For practical purposes, however, a sample size of 1,500 people will give acceptably accurate results even if the population being researched was the entire adult population of Canada. For instance, an Ipsos Reid poll, if conducted as a nationwide random sampling, should be able to provide an accurate estimate of public opinion whether it contacts 1,500 or 10,000 people.

Typically surveys will include a figure that gives the margin of error of the survey results. Based on probabilities, this will give a range of values within which the true value of the population characteristic will be. This figure also depends on the size of a sample. For example, a political poll based on a sample of 1,500 respondents might state that if an election were called tomorrow the Conservative Party would get 30% of the vote plus or minus 2.5% based on a confidence interval of

95%. That is, there is a 5% chance that the true vote would fall outside of the range of 27.5% to 32.5%, or 1 time out of 20 if you were to conduct the poll 20 times. If the poll was based on a sample of 1,000 respondents, the margin of error would be higher, plus or minus 3.1%. This is significant, of course, because if the Conservatives are polling at 30% and the Liberals are polling at 28% the poll would be inconclusive about which party is actually ahead with regard to actual voter preferences.

Problems with accuracy or *validity* can result if sample sizes are too small because there is a stronger chance the sample size will not capture the actual distribution of characteristics of the whole population. In small samples the characteristics of specific individuals have a greater chance of influencing the results. The validity of surveys can also be threatened when part of the population is inadvertently excluded from the sample (e.g., telephone surveys that rely on land lines exclude people that use only cell phones) or when there is a low response rate. There is also a question of what exactly is being measured by the survey. In the BC election of 2013, polls found that the NDP had the largest popular support but on election day many people who said they would vote NDP did not actually vote, which resulted in a Liberal majority government.

After selecting subjects, the researcher develops a specific plan to ask a list of standardized questions and record responses. It is important to inform subjects of the nature and purpose of the study upfront. If they agree to participate, researchers thank the subjects and offer them a chance to see the results of the study if they are interested. The researchers present the subjects with an instrument or means of gathering the information. A common instrument is a structured written questionnaire in which subjects answer a series of set questions. For some topics, the researcher might ask yes-or-no or multiple-choice questions, allowing subjects to choose possible responses to each question.

This kind of **quantitative data —** research collected in numerical form that can be counted — is easy to tabulate. Just count up the number of "yes" and "no" answers or tabulate the scales of "strongly agree," "agree," "disagree," etc. responses and chart them into percentages. This is also the chief drawback of questionnaires, however: their artificiality. In real life, there are rarely any unambiguously yes or no answers. Questionnaires can also ask more complex questions with more complex answers beyond yes, no, agree, strongly agree, or another option next to a check box. In those cases, the answers are subjective, varying from person to person. How do you plan to use your university education? Why do you follow Justin Bieber on Twitter? Those types of questions require short essay responses, and participants willing to take the time to write those answers will convey personal information about their beliefs, views, and attitudes.

Some topics that reflect internal subjective perspectives are impossible to observe directly. Sometimes they can be sensitive and difficult to discuss honestly in a public forum or with a stranger. People are more likely to share honest answers if they can respond to questions anonymously. This type of information is **qualitative data —** results that are subjective and often based on what is experienced in a natural setting. Qualitative information is harder to organize and tabulate. The researcher will end up with a wide range of responses, and some of which may be surprising. The benefit of written opinions, though, is the wealth of material that they provide.

An **interview** is a one-on-one conversation between the researcher and the subject, and is another way of conducting surveys on a topic. Interviews are similar to the short answer questions on surveys in that the researcher asks subjects a series of questions. They can be quantitative if the questions are standardized and have numerically quantifiable answers: Are you employed? (Yes=0, No=1); On a scale of 1 to 5 how would you describe your level of optimism? They can also be qualitative if participants are free to respond as they wish, without being limited by predetermined choices. In the back-and-forth conversation of an interview, a researcher can ask for clarification, spend more time on a subtopic, or ask additional questions. In an interview, a subject will ideally feel free to open up and answer questions that are often complex. There are no right or wrong answers. The subject might not even know how to answer the questions honestly. Questions such as "How did society's view of alcohol consumption influence your decision whether or not to take your first sip of alcohol?" or "Did you feel that the divorce of your parents would put a social stigma on your family?" involve so many factors that the answers are difficult to categorize. A researcher needs to avoid steering or prompting the subject to respond in a specific way; otherwise, the results will prove to be unreliable. Obviously, a sociological interview is also not supposed to be an interrogation. The researcher will benefit from gaining a subject's trust by empathizing or commiserating with a subject, and by listening without judgement.

2. Experiments

You have probably tested personal social theories. "If I study at night and review in the morning, I'll improve my

retention skills." Or, "If I stop drinking soda, I'll feel better." Cause and effect. If this, then that. When you test a theory, your results either prove or disprove your hypothesis. One way researchers test social theories is by conducting an **experiment**, meaning they investigate relationships to test a hypothesis — a scientific approach. There are two main types of experiments: lab-based experiments, and natural or field experiments.

In a lab setting the research can be controlled so that, perhaps, more data can be recorded in a certain amount of time. In a natural or field-based experiment, the generation of data cannot be controlled, but the information might be considered more accurate since it was collected without interference or intervention by the researcher. As a research method, either type of sociological experiment is useful for testing if-then statements: *if* a particular thing happens, *then* another particular thing will result.

To set up a lab-based experiment, sociologists create artificial situations that allow them to manipulate variables. Classically, the sociologist selects a set of people with similar characteristics, such as age, class, race, or education. Those people are divided into two groups. One is the experimental group and the other is the **control group**. The experimental group is exposed to the independent variable(s) and the control group is not. This is similar to pharmaceutical drug trials in which the experimental group is given the test drug and the control group is given a placebo or sugar pill.

Making Connections: Sociological Research

An Experiment in Action: Mincome



Figure 2.11. Mincome was a large-scale experiment conducted in Dauphin, Manitoba, between 1974 and 1979 to explore the effect of having a universal guaranteed annual income on the incentive to work and other social indicators. (Photo courtesy of Bobak Ha'Eri/Wikimedia commons)

A real-life example will help illustrate the experimental process in sociology. Between 1974 and 1979 an experiment was conducted in the small town of Dauphin, Manitoba (the "garden capital of Manitoba"). Each family received a modest monthly guaranteed income — a "mincome" — equivalent to a maximum of 60 percent of the "low-income cut-off figure" (a Statistics Canada measure of poverty, which varies with family size). The income was 50 cents per dollar less for families who had incomes from other sources. Families earning over a certain income level did not receive mincome. Families that were already collecting welfare or unemployment insurance were also excluded. The test families in Dauphin were compared with control groups in other rural Manitoba communities on a range of indicators such as number of hours worked per week, school performance, high school drop out rates, and hospital visits (Forget, 2011). A guaranteed annual income was seen at the time as a less costly, less bureaucratic public alternative for addressing poverty than the existing employment insurance and welfare programs. Today it is an active proposal being considered in Switzerland (Lowrey, 2013).

Intuitively, it seems logical that lack of income is the cause of poverty and poverty-related issues. One of the main concerns, however, was whether a guaranteed income would create a disincentive to work. The concept appears to

challenge the principles of the Protestant work ethic (see the discussion of Max Weber in Chapter 1). The study did find very small decreases in hours worked per week: about 1 percent for men, 3 percent for married women, and 5 percent for unmarried women. Forget (2011) argues this was because the income provided an opportunity for people to spend more time with family and school, especially for young mothers and teenage girls. There were also significant social benefits from the experiment, including better test scores in school, lower high school drop out rates, fewer visits to hospital, fewer accidents and injuries, and fewer mental health issues.

Ironically, due to lack of guaranteed funding (and lack of political interest by the late 1970s), the data and results of the study were not analyzed or published until 2011. The data were archived and sat gathering dust in boxes. The mincome experiment demonstrated the benefits that even a modest guaranteed annual income supplement could have on health and social outcomes in communities. People seem to live healthier lives and get a better education when they do not need to worry about poverty. In her summary of the research, Forget notes that the impact of the income supplement was surprisingly large given that at any one time only about a third of the families were receiving the income and, for some families, the income amount would have been very small. The income benefit was largest for low-income working families, but the research showed that the entire community profited. The improvement in overall health outcomes for the community suggest that a guaranteed income would also result in savings for the public health system.

To test the benefits of tutoring, for example, the sociologist might expose the experimental group of students to tutoring while the control group does not receive tutoring. Then both groups would be tested for differences in performance to see if tutoring had an effect on the experimental group of students. As you can imagine, in a case like this, the researcher would not want to jeopardize the accomplishments of either group of students, so the setting would be somewhat artificial. The test would not be for a grade reflected on their permanent record, for example.

The Stanford Prison Experiment is perhaps one of the most famous sociological experiments ever conducted. In 1971, 24 healthy, middle-class male university students were selected to take part in a simulated jail environment to examine the effects of social setting and social roles on individual psychology and behaviour. They were randomly divided into 12 guards and 12 prisoners. The prisoner subjects were arrested at home and transported blindfolded to the simulated prison in the basement of the psychology building on the campus of Stanford University. Within a day of arriving the prisoners and the guards began to display signs of trauma and sadism respectively. After some prisoners revolted by blockading themselves in their cells, the guards resorted to using increasingly humiliating and degrading tactics to control the prisoners through psychological manipulation. The experiment had to be abandoned after only six days because the abuse had grown out of hand (Haney, Banks, & Zimbardo, 1973). While the insights into the social dynamics of authoritarianism it generated were fascinating, the Stanford Prison Experiment also serves as an example of the ethical issues that emerge when experimenting on human subjects.

3. Field Research

The work of sociology rarely happens in limited, confined spaces. Sociologists seldom study subjects in their own offices or laboratories. Rather, sociologists go out into the world. They meet subjects where they live, work, and play. **Field research** refers to gathering **primary data** from a natural environment without doing a lab experiment or a survey. It is a research method suited to an interpretive approach rather than to positivist approaches. To conduct field research, the sociologist must be willing to step into new environments and observe, participate, or experience those worlds. In fieldwork, the sociologists, rather than the subjects, are the ones out of their element. The researcher interacts with or observes a person or people, gathering data along the way. The key point in field research is that it takes place in the subject's natural environment, whether it's a coffee shop or tribal village, a homeless shelter or a care home, a hospital, airport, mall, or beach resort.

While field research often begins in a specific setting, the study's purpose is to observe specific behaviours in that setting. Fieldwork is optimal for observing *how* people behave. It is less useful, however, for developing causal explanations of *why* they behave that way. From the small size of the groups studied in fieldwork, it is difficult to make predictions or generalizations to a larger population. Similarly, there are difficulties in gaining an objective distance from research



Figure 2.12. Sociological researchers travel across countries and cultures to interact with and observe subjects in their natural environments. (Photo courtesy of Patrick/Flickr)

subjects. It is difficult to know whether another researcher would see the same things or record the same data. We will look at three types of field research: participant observation, ethnography, and the case study.

Making Connections: Sociology in the Real World

When Is Sharing Not Such a Good Idea?



Figure 2.13. Crack cocaine users in downtown Vancouver. (Photo courtesy of Wikimedia Commons)

Choosing a research methodology depends on a number of factors, including the purpose of the research and the audience for whom the research is intended. If we consider the type of research that might go into producing a government policy document on the effectiveness of safe injection sites for reducing the public health risks of

intravenous drug use, we would expect public administrators to want "hard" (i.e., quantitative) evidence of high reliability to help them make a policy decision. The most reliable data would come from an experimental or quasi-experimental research model in which a control group can be compared with an experimental group using quantitative measures.

This approach has been used by researchers studying InSite in Vancouver (Marshall et al., 2011; Wood et al., 2006). InSite is a supervised safe-injection site where heroin addicts and other intravenous drug users can go to inject drugs in a safe, clean environment. Clean needles are provided and health care professionals are on hand to intervene in the case of overdoses or other medical emergency. It is a controversial program both because heroin use is against the law (the facility operates through a federal ministerial exemption) and because the heroin users are not obliged to quit using or seek therapy. To assess the effectiveness of the program, researchers compared the risky usage of drugs in populations before and after the opening of the facility and geographically near and distant to the facility. The results from the studies have shown that InSite has reduced both deaths from overdose and risky behaviours, such as the sharing of needles, without increasing the levels of crime associated with drug use and addiction.

On the other hand, if the research question is more exploratory (for example, trying to discern the reasons why individuals in the crack smoking subculture engage in the risky activity of sharing pipes), the more nuanced approach of fieldwork is more appropriate. The research would need to focus on the subcultural context, rituals, and meaning of sharing pipes, and why these phenomena override known health concerns. Graduate student Andrew Ivsins at the University of Victoria studied the practice of sharing pipes among 13 habitual users of crack cocaine in Victoria, B.C. (Ivsins, 2010). He met crack smokers in their typical setting downtown and used an unstructured interview method to try to draw out the informal norms that lead to sharing pipes. One factor he discovered was the bond that formed between friends or intimate partners when they shared a pipe. He also discovered that there was an elaborate subcultural etiquette of pipe use that revolved around the benefit of getting the crack resin smokers left behind. Both of these motives tended to outweigh the recognized health risks of sharing pipes (such as hepatitis) in the decision making of the users. This type of research was valuable in illuminating the unknown subcultural norms of crack use that could still come into play in a harm reduction strategy such as distributing safe crack kits to addicts.

Participant Observation

In 2000, a comic writer named Rodney Rothman wanted an insider's view of white-collar work. He slipped into the sterile, high-rise offices of a New York "dot com" agency. Every day for two weeks, he pretended to work there. His main purpose was simply to see if anyone would notice him or challenge his presence. No one did. The receptionist greeted him. The employees smiled and said good morning. Rothman was accepted as part of the team. He even went so far as to claim a desk, inform the receptionist of his whereabouts, and attend a meeting. He published an article about his experience in *The New Yorker* called "My Fake Job" (2000). Later, he was discredited for allegedly fabricating some details of the story and *The New Yorker* issued an apology. However, Rothman's entertaining article still offered fascinating descriptions of the inside workings of a dot com company and exemplified the lengths to which a sociologist will go to uncover material.

Rothman had conducted a form of study called **participant observation**, in which researchers join people and participate in a group's routine activities for the purpose of observing them within that context. This method lets researchers study a naturally occurring social activity without imposing artificial or intrusive research devices, like fixed questionnaire questions, onto the situation. A researcher might go to great lengths to get a firsthand look into a trend, institution, or behaviour. Researchers temporarily put themselves into "native" roles and record their observations. A researcher might work as a waitress in a diner, or live as a homeless person for several weeks, or ride along with police officers as they patrol their regular beat. Often, these researchers try to blend in seamlessly with the population they study, and they may not disclose their true identity or purpose if they feel it would compromise the results of their research.

At the beginning of a field study, researchers might have a question: "What really goes on in the kitchen of the most popular diner on campus?" or "What is it like to be homeless?" Participant observation is a useful method if the researcher wants to explore a certain environment from the inside. Field researchers simply want to observe and learn. In such a setting, the researcher will be alert and open minded to whatever happens, recording all observations accurately. Soon, as



Figure 2.14. Is she a working waitress or a sociologist conducting a study using participant observation? (Photo courtesy of Zoetnet/Flickr)

patterns emerge, questions will become more specific, observations will lead to hypotheses, and hypotheses will guide the researcher in shaping data into results.

In a study of small town America conducted by sociological researchers John S. Lynd and Helen Merrell Lynd, the team altered their purpose as they gathered data. They initially planned to focus their study on the role of religion in American towns. As they gathered observations, they realized that the effect of industrialization and urbanization was the more relevant topic of this social group. The Lynds did not change their methods, but they revised their purpose. This shaped the structure of *Middletown: A Study in Modern American Culture*, their published results (Lynd & Lynd, 1959).



Figure 2.15. A classroom in Muncie, Indiana, in 1917, five years before John and Helen Lynd began researching this "typical" American community. (Photo courtesy of Don O'Brien/Flickr)

The Lynds were upfront about their mission. The townspeople of Muncie, Indiana knew why the researchers were in their midst. But some sociologists prefer not to alert people to their presence. The main advantage of covert participant observation is that it allows the researcher access to authentic, natural behaviours of a group's members. The challenge, however, is gaining access to a setting without disrupting the pattern of others' behaviour. Becoming an inside member of a group, organization, or subculture takes time and effort. Researchers must pretend to be something they are not.

The process could involve role playing, making contacts, networking, or applying for a job. Once inside a group, some researchers spend months or even years pretending to be one of the people they are observing. However, as observers, they cannot get too involved. They must keep their purpose in mind and apply the sociological perspective. That way, they illuminate social patterns that are often unrecognized. Because information gathered during participant observation is mostly qualitative, rather than quantitative, the end results are often descriptive or interpretive. The researcher might present findings in an article or book, describing what he or she witnessed and experienced.

This type of research is what journalist Barbara Ehrenreich conducted for her book *Nickel and Dimed*. One day over lunch with her editor, as the story goes, Ehrenreich mentioned an idea. "How can people exist on minimum-wage work? How do low-income workers get by?" she wondered. "Someone should do a study." To her surprise, her editor responded, "Why don't you do it?" That is how Ehrenreich found herself joining the ranks of the low-wage service sector. For several months, she left her comfortable home and lived and worked among people who lacked, for the most part, higher education and marketable job skills. Undercover, she applied for and worked minimum wage jobs as a waitress, a cleaning woman, a nursing home aide, and a retail chain employee. During her participant observation, she used only her income from those jobs to pay for food, clothing, transportation, and shelter. She discovered the obvious: that it's almost impossible to get by on minimum wage work. She also experienced and observed attitudes many middle- and upper-class people never think about. She witnessed firsthand the treatment of service work employees. She saw the extreme measures people take to make ends meet and to survive. She described fellow employees who held two or three jobs, worked seven days a week, lived in cars, could not pay to treat chronic health conditions, got randomly fired, submitted to drug tests, and moved in and out of homeless shelters. She brought aspects of that life to light, describing difficult working conditions and the poor treatment that low-wage workers suffer.



Figure 2.16. Field research happens in real locations. What type of environment do work spaces foster? What would a sociologist discover after blending in? (Photo courtesy of drewzhrodague/Flickr)

Ethnography

Ethnography is the extended observation of the social perspective and cultural values of an entire social setting. Researchers seek to immerse themselves in the life of a bounded group by living and working among them. Often ethnography involves participant observation, but the focus is the systematic observation of an entire community. The heart of an ethnographic study focuses on how subjects view their own social standing and how they understand themselves in relation to a community. It aims at developing a "thick description" of people's behaviour that describes not only the behaviour itself but the layers of meaning that form the context of the behaviour (Geertz, 1973). An ethnographic study might observe, for example, a small Newfoundland fishing town, an Inuit community, a scientific

research laboratory, a backpacker's hostel, a private boarding school, or Disney World. These places all have borders. People live, work, study, or vacation within those borders. People are there for a certain reason and therefore behave in certain ways and respect certain cultural norms. An ethnographer would commit to spending a determined amount of time studying every aspect of the chosen place, taking in as much as possible, and keeping careful notes on his or her observations. A sociologist studying a ayahuasca ceremonies in the Amazon might learn the language, watch the way shamans go about their daily lives, ask individuals about the meaning of different aspects of the activity, study the group's cosmology, and then write a paper about it. To observe a Buddhist retreat centre, an ethnographer might sign up for a retreat and attend as a guest for an extended stay, observe and record how people experience spirituality in this setting, and collate the material into results.

Making Connections: Sociological Research

The Feminist Perspective: Institutional Ethnography

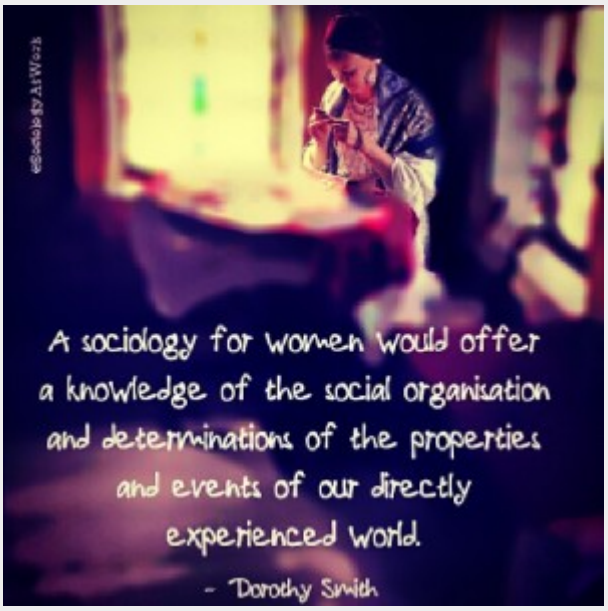


Figure 2.17. A sociology for women. [Long Description] (Photo courtesy of Zuleyka Zevallos/Flickr)

Dorothy Smith elaborated on traditional ethnography to develop what she calls **institutional ethnography** (2005). In modern society the practices of everyday life in any particular local setting are often organized at a level that goes beyond what an ethnographer might observe directly. Everyday life is structured by "extralocal," institutional forms; that is, by the practices of institutions that act upon people from a distance. It might be possible to conduct ethnographic research on the experience of domestic abuse by living in a women's shelter and directly observing and interviewing victims to see how they form an understanding of their situation. However, to the degree that the women are seeking redress through the criminal justice system a crucial element of the situation would be missing. In order to activate a response from the police or the courts, a set of standard legal procedures must be followed, a case file must be opened, legally actionable evidence must be established, forms filled out, etc. All of this allows criminal justice agencies to organize and coordinate the response.The urgent and immediate experience of the domestic abuse victims needs to be translated into a format that enables distant authorities to take action. Often this is a frustrating and mysterious process in which the immediate needs of individuals are neglected so that needs of institutional processes are met. Therefore, to research the situation of domestic abuse victims, an ethnography needs to somehow operate at two levels: the close examination of the local experience of particular women and the simultaneous examination of the extralocal, institutional world through which their world is organized. In order to accomplish this, institutional ethnography focuses on the study of the way everyday life is coordinated through "textually mediated"

practices: the use of written documents, standardized bureaucratic categories, and formalized relationships (Smith, 1990).Institutional paperwork translates the specific details of locally lived experience into a standardized format that enables institutions to apply the institution's understandings, regulations, and operations in different local contexts. A study of these textual practices reveals otherwise inaccessible processes that formal organizations depend on: their formality, their organized character, their ongoing methods of coordination, etc. An institutional ethnography often begins by following the paper trail that emerges when people interact with institutions: How does a person formulate a narrative about what has happened to him or her in a way that the institution will recognize? How is it translated into the abstract categories on a form or screen that enable an institutional response to be initiated? What is preserved in the translation to paperwork, and what is lost? Where do the forms go next? What series of "processing interchanges" take place between different departments or agencies through the circulation of paperwork? How is the paperwork modified and made actionable through this process (e.g., an incident report, warrant request, motion for continuance)?Smith's insight is that the shift from the locally lived experience of individuals to the extralocal world of institutions is nothing short of a radical metaphysical shift in worldview. In institutional worlds, meanings are detached from directly lived processes and reconstituted in an organizational time, space, and consciousness that is fundamentally different from their original reference point. For example, the crisis that has led to a loss of employment becomes a set of anonymous criteria that determines one's eligibility for Employment Insurance.The unique life of a disabled child becomes a checklist that determines the content of an "individual education program" in the school system, which in turn determines whether funding will be provided for special aid assistants or therapeutic programs. Institutions put together a picture of what has occurred that is not at all the same as what was lived. The ubiquitous but obscure mechanism by which this is accomplished is **textually mediated communication**. The goal of institutional ethnography, therefore, is to make "documents or texts visible as constituents of social relations" (Smith, 1990). Institutional ethnography is very useful as a critical research strategy. It is an analysis that gives grassroots organizations, or those excluded from the circles of institutional power, a detailed knowledge of how the administrative apparatuses actually work. This type of research enables more effective actions and strategies for change to be pursued.

The Case Study

Sometimes a researcher wants to study one specific person or event. A **case study** is an in-depth analysis of a single event, situation, or individual. To conduct a case study, a researcher examines existing sources like documents and archival records, conducts interviews, engages in direct observation, and even participant observation, if possible. Researchers might use this method to study a single case of, for example, a foster child, drug lord, cancer patient, criminal, or rape victim. However, a major criticism of the case study as a method is that a developed study of a single case, while offering depth on a topic, does not provide enough evidence to form a generalized conclusion. In other words, it is difficult to make universal claims based on just one person, since one person does not verify a pattern. This is why most sociologists do not use case studies as a primary research method.

However, case studies are useful when the single case is unique. In these instances, a single case study can add tremendous knowledge to a certain discipline. For example, a feral child, also called "wild child," is one who grows up isolated from human beings. Feral children grow up without social contact and language, which are elements crucial to a "civilized" child's development. These children mimic the behaviours and movements of animals, and often invent their own language. There are only about 100 cases of feral children in the world. As you may imagine, a feral child is a subject of great interest to researchers. Feral children provide unique information about child development because they have grown up outside of the parameters of normal child development. And since there are very few feral children, the case study is the most appropriate method for researchers to use in studying the subject. At age three, a Ukrainian girl named Oxana Malaya suffered severe parental neglect. She lived in a shed with dogs, eating raw meat and scraps. Five years later, a neighbour called authorities and reported seeing a girl who ran on all fours, barking. Officials brought Oxana into society, where she was cared for and taught some human behaviours, but she never became fully socialized. She has been designated as unable to support herself and now lives in a mental institution (Grice, 2006). Case studies like this offer a way for sociologists to collect data that may not be collectable by any other method.

4. Secondary Data or Textual Analysis

While sociologists often engage in original research studies, they also contribute knowledge to the discipline through **secondary data** or **textual analysis**. Secondary data do not result from firsthand research collected from primary sources, but are drawn from the already-completed work of other researchers. Sociologists might study texts written by historians, economists, teachers, or early sociologists. They might search through periodicals, newspapers, or magazines from any period in history. Using available information not only saves time and money, but it can add depth to a study. Sociologists often interpret findings in a new way, a way that was not part of an author's original purpose or intention. To study how women were encouraged to act and behave in the 1960s, for example, a researcher might watch movies, televisions shows, and situation comedies from that period. Or to research changes in behaviour and attitudes due to the emergence of television in the late 1950s and early 1960s, a sociologist would rely on new interpretations of secondary data. Decades from now, researchers will most likely conduct similar studies on the advent of mobile phones, the internet, or Facebook.

One methodology that sociologists employ with secondary data is **content analysis**. Content analysis is a quantitative approach to textual research that selects an item of textual content (i.e., a variable) that can be reliably and consistently observed and coded, and surveys the prevalence of that item in a sample of textual output. For example, Gilens (1996) wanted to find out why survey research shows that the American public substantially exaggerates the percentage of African Americans among the poor. He examined whether media representations influence public perceptions and did a content analysis of photographs of poor people in American news magazines. He coded and then systematically recorded incidences of three variables: (1) race: white, black, indeterminate; (2) employed: working, not working; and (3) age. Gilens discovered that not only were African Americans markedly overrepresented in news magazine photographs of poverty, but that the photos also tended to under represent "sympathetic" subgroups of the poor—the elderly and working poor—while over representing less sympathetic groups—unemployed, working age adults. Gilens concluded that by providing a distorted representation of poverty, U.S. news magazines "reinforce negative stereotypes of blacks as mired in poverty and contribute to the belief that poverty is primarily a 'black problem'" (1996).

Social scientists also learn by analyzing the research of a variety of agencies. Governmental departments, public interest research groups, and global organizations like Statistics Canada, the Canadian Centre for Policy Alternatives, or the World Health Organization publish studies with findings that are useful to sociologists. A public statistic that measures inequality of incomes might be useful for studying who benefited and who lost as a result of the 2008 recession; a demographic profile of different immigrant groups might be compared with data on unemployment to examine the reasons why immigration settlement programs are more effective for some communities than for others. One of the advantages of secondary data is that it is **nonreactive** (or unobtrusive) research, meaning that it does not include direct contact with subjects and will not alter or influence people's behaviours. Unlike studies requiring direct contact with people, using previously published data does not require entering a population and the investment and risks inherent in that research process.

Using available data does have its challenges. Public records are not always easy to access. A researcher needs to do some legwork to track them down and gain access to records. In some cases there is no way to verify the accuracy of existing data. It is easy, for example, to count how many drunk drivers are pulled over by the police. But how many are not? While it's possible to discover the percentage of teenage students who drop out of high school, it might be more challenging to determine the number who return to school or get their high school diplomas later. Another problem arises when data are unavailable in the exact form needed or do not include the precise angle the researcher seeks. For example, the salaries paid to professors at universities are often published, but the separate figures do not necessarily reveal how long it took each professor to reach the salary range, what their educational backgrounds are, or how long they have been teaching.

In his research, sociologist Richard Sennett uses secondary data to shed light on current trends. In *The Craftsman* (2008), he studied the human desire to perform quality work, from carpentry to computer programming. He studied the line between craftsmanship and skilled manual labour. He also studied changes in attitudes toward craftsmanship that occurred not only during and after the Industrial Revolution, but also in ancient times. Obviously, he could not have firsthand knowledge of periods of ancient history, so he had to rely on secondary data for part of his study.

When conducting secondary data or textual analysis, it is important to consider the date of publication of an existing source and to take into account attitudes and common cultural ideals that may have influenced the research. For example, Robert and Helen Lynd gathered research for their book *Middletown: A Study in Modern American Culture* in the 1920s. Attitudes and cultural norms were vastly different then than they are now. Beliefs about gender roles, race, education, and

work have changed significantly since then. At the time, the study's purpose was to reveal the truth about small American communities. Today, it is an illustration of 1920s attitudes and values.

Reading Tables

Table 2.3. Firearm-Related Violent Crime, by Selected Offences, in Canada and the United States, 2012 (adapted from Cotter, 2014)

[Skip Table]

Country	Offence	Number	Percent of total offences	Rate (per 100,0
	Homicide	172	33	0.5
Canada	Major assault	1,459	4	5.5
	Robbery	2,368	12	8.9
	Homicide	8,813	69	3.5
United States	Major assault	143,119	22	52.8
	Robbery	122,174	41	45.1

One of the common forms in which one encounters secondary data is the **contingency table**. A contingency table provides a frequency distribution of at least two variables that allows the researcher to see at a glance how the variables are related. Table 2.3 shows the frequency of different types of firearm crime for Canada and the United States. In this table, the independent variable (the causal variable) is the country, either Canada or the United States. The dependent variable, displayed in the columns, is the frequency of offences that involve firearms in the two countries. This is given as an absolute number ("number"), as a percentage of the total number of crimes in that category (i.e., as a percentage of the total number of homicides, major assaults and robberies; "percent of total offences"), and as rate calculated per 100,000 population ("rate").To interpret the table, the researcher has to pay attention to what adds up to 100%. In this table we have not been given the complete information in each column, but it is straight forward to recognize that if 33% of the homicides in Canada involved the use of a firearm, another 67% of homicides did not. The table, therefore, does not say that 33% of all firearm crimes in Canada were homicides. From these figures one can also calculate the total number of homicides that took place in Canada in 2012 by a simple ratio: If the 172 homicides that involved firearms represents 33% or 1/3 of all the Canadian homicides, then there were (approximately) 516 homicides in Canada in 2012.

The table suggests that there is a definite correlation between country and firearm-related violent crime. Violent crime in the United States tends to involve firearms much more frequently than violent crime in Canada. With respect to homicides, there were 8,813 homicides involving firearms in the United States in 2012, accounting for 69% of all homicides, while in Canada, firearms accounted for 33% of homicides. The column that gives the rates of firearm violence per 100,000 population allows the researcher to identify a comparison figure that takes into account the different population sizes of the two countries. The rate of firearm-related homicide in the United States was about seven times higher than in Canada in 2012 (0.5 per 100,000 compared to 3.5 per 100,000), firearm-related major assault was about ten times higher (53 per 100,000 compared to 5 per 100,000), and firearm-related robbery was about five times higher (8.9 per 100,000 compared to 45.1 per 100,000).

The question that this data raises is about causation. Why are firearm-related violent crimes so much lower in Canada than in the United States? One key element are the legal restrictions on firearm possession in the two countries. Canadian law requires that an individual has a valid license under the Firearms Act in order to own or possess a firearm or to purchase ammunition. Until 2012, all firearms also had to be registered, but with the repeal of the national gun registry provisions

for long guns (rifles and shot guns), currently only hand guns and prohibited weapons (assault weapons, fully automatic firearms, and sawed-off rifles or shotguns) have to be registered. In the United States firearm regulations are state-specific and only a few states place restrictions on the possession of firearms. In 2007, there were 89 firearms for every 100 citizens in the United States, which is the highest rate of gun ownership of any country (Cotter, 2014). Nevertheless, as Canada's firearm-related homicide rate is higher than several peer countries, most notably Japan and the United Kingdom, variables other than gun control legislation might be a factor.

Summary

As noted above, there is not only a variety of theoretical perspectives in sociology, but also a diversity of research methodologies that can be used in studying the social. In large part, the choice of research methodology follows from the choice of the research question. Of course, the choice of the research question itself depends on the same sort of underlying values and decisions about the nature of the world that divide the theoretical perspectives in sociology. In addition, the choice of the research question involves both the character of the social phenomenon being studied and the purpose of the research in the first place.

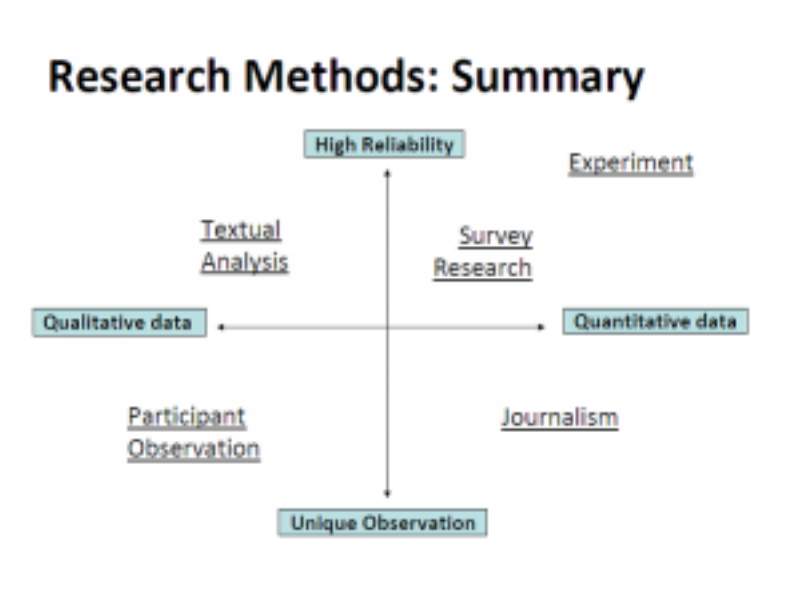


Figure 2.18. Research methods summary. [Long Description] (Source: William Little)

Again, it is useful to map out the different methodologies in a diagram. We can position them along two axes according to: (a) whether the subject matter or purpose of the research calls for highly reliable findings — consistent between research contexts (high reliability) — or for highly valid and nuanced findings true to the specific social situation under observation (unique observation), and (b) whether the nature of the object of research can be meaningfully operationalized and measured using quantitative techniques (quantitative data) or is better grasped in terms of the texture of social meanings that constitute it (qualitative data). The advantages and disadvantages of the different methodologies are summarized in Table 2.4 below.

Table 2.4. Main Sociological Research Methods. Sociological research methods have advantages and disadvantages.

[Skip Table]

Method	Implementation	Advantages	Challenges
Survey	• Questionnaires • Interviews	• Yields many responses • Can survey a large sample • Data generalizable • Quantitative data are easy to chart	• Can be time consuming • Can be difficult to encourage participant response • Captures what people think and believe, but not necessarily how they behave in real life
Field Work	• Observation • Participant observation • Ethnography • Case study	• Yields detailed, accurate, real-life information	• Time consuming • Data are often descriptive and not conducive to generalization • Researcher bias is difficult to control for • Qualitative data are difficult to organize
Experiment	• Deliberate manipulation of social customs and mores	• Tests cause and effect relationships	• Hawthorne effect • Artificial conditions of research • Ethical concerns about people's wellbeing
Secondary Data Analysis	• Analysis of government data (census, health, crime statistics) • Research of historic documents • Content analysis	• Makes good use of previous sociological information	• Data could be focused on a purpose other than yours • Data can be hard to find • Taking into account the historical or cultural context of texts

2.3. Ethical Concerns

Sociologists conduct studies to shed light on human behaviours. Knowledge is a powerful tool that can be used toward positive change. And while a sociologist's goal is often simply to uncover knowledge rather than to spur action, many people use sociological studies to help improve people's lives. In that sense, conducting a sociological study comes with a tremendous amount of responsibility. Like any researchers, sociologists must consider their ethical obligation to avoid harming subjects or groups while conducting their research. The Canadian Sociological Association (CSA), is the major professional organization of sociologists in Canada. The CSA is a great resource for students of sociology as well.

The CSA maintains a **code of ethics —** formal guidelines for conducting sociological research — consisting of principles and ethical standards to be used in the discipline. It also describes procedures for filing, investigating, and resolving complaints of unethical conduct. These are in line with the *Tri-Council Policy Statement on Ethical Conduct for Research Involving Humans* (2010), which applies to any research with human subjects funded by one of the three federal research agencies — the Canadian Institutes of Health Research (CIHR), the Natural Sciences and Engineering Research Council of Canada (NSERC), and the Social Sciences and Humanities Research Council of Canada (SSHRC).

Practising sociologists and sociology students have a lot to consider. Some of the guidelines state that researchers must try to be skillful and fair-minded in their work, especially as it relates to their human subjects. Researchers must obtain participants' informed consent, and they must inform subjects of the responsibilities and risks of research before they agree to participate. During a study, sociologists must ensure the safety of participants and immediately stop work if a subject becomes potentially endangered on any level. Researchers are required to protect the privacy of research participants whenever possible. Even if pressured by authorities, such as police or courts, researchers are not ethically allowed to release

confidential information. Researchers must make results available to other sociologists, must make public all sources of financial support, and must not accept funding from any organization that might cause a conflict of interest or seek to influence the research results for its own purposes. The CSA's ethical considerations shape not only the study but also the publication of results.

Pioneer German sociologist Max Weber identified another crucial ethical concern. Weber understood that personal values could distort the framework for disclosing study results. While he accepted that some aspects of research design might be influenced by personal values, he declared it was entirely inappropriate to allow personal values to shape the interpretation of the responses. Sociologists, he stated, must establish **value neutrality**, a practice of remaining impartial, without bias or judgement, during the course of a study and in publishing results (1949). Sociologists are obligated to disclose research findings without omitting or distorting significant data. Value neutrality does not mean having no opinions. It means striving to overcome personal biases, particularly subconscious biases, when analyzing data. It means avoiding skewing data in order to match a predetermined outcome that aligns with a particular agenda, such as a political or moral point of view. Investigators are ethically obligated to report results, even when they contradict personal views, predicted outcomes, or widely accepted beliefs. Is value neutrality possible?

Many sociologists believe it is impossible to set aside personal values and retain complete objectivity. Individuals inevitably see the world from a partial perspective. Their interests are central to the types of topics they choose, the types of questions they ask, the way they frame their research, and the research methodologies they select to pursue it. Moreover, facts, however objective, do not exist in a void. As was noted in Chapter 1, Jürgen Habermas (1972) argues that sociological research has built-in interests quite apart from the personal biases of individual researchers. Positivist sociology has an interest in pursuing types of knowledge that are useful for controlling and administering social life. Interpretive sociology has an interest in pursuing types of knowledge that promote greater mutual understanding and the possibility of consensus among members of society. Critical sociology has an interest in types of knowledge that enable emancipation from power relations and forms of domination in society. In Habermas' view, sociological knowledge is not disinterested knowledge. This does not discredit the results of sociological research but allows readers to take into account the perspective of the research when judging the validity and applicability of its outcomes.

Key Terms

authoritative knowledge: Knowledge based on the accepted authority of the source.

case study: In-depth analysis of a single event, situation, or individual.

casual observation: Knowledge based on observations without any systematic process for observing or assessing the accuracy of observations.

code of ethics: A set of guidelines that the Canadian Sociological Association has established to foster ethical research and professionally responsible scholarship in sociology.

content analysis: A quantitative approach to textual research that selects an item of textual content that can be reliably and consistently observed and coded, and surveys the prevalence of that item in a sample of textual output.

contingency table: A statistical table that provides a frequency distribution of at least two variables.

control group: An experimental group that is not exposed to the independent variable.

correlation: When a change in one variable coincides with a change in another variable, but does not necessarily indicate causation.

dependent variable: Variable changed by another variable.

empirical evidence: Evidence corroborated by direct experience and/or observation.

ethnography: Observing a complete social setting and all that it entails.

experiment: The testing of a hypothesis under controlled conditions.

field research: Gathering data from a natural environment without doing a lab experiment or a survey.

Hawthorne effect: When study subjects behave in a certain manner due to their awareness of being observed by a researcher.

hypothesis: An educated guess with predicted outcomes about the relationship between two or more variables.

hypothetico-deductive methodologies: Methodologies based on deducing a prediction from a hypothesis and testing the validity of the hypothesis by whether it correctly predicts observations.

independent variable: Variable that causes change in a dependent variable.

inductive approach: Methodologies that derive a general statement from a series of empirical observations.

institutional ethnography: The study of the way everyday life is coordinated through institutional, textually mediated practices.

interpretive approach: A sociological research approach that seeks in-depth understanding of a topic or subject through observation or interaction.

intervening variable: An underlying variable that explains the correlation between two other variables.

interview: A one-on-one conversation between a researcher and a subject.

literature review: A scholarly research step that entails identifying and studying all existing studies on a topic to create a basis for new research.

nonreactive: Unobtrusive research that does not include direct contact with subjects and will not alter or influence people's behaviours.

operational definitions: Specific explanations of abstract concepts that a researcher plans to study.

overgeneralization: Knowledge that draws general conclusions from limited observations.

participant observation: Immersion by a researcher in a group or social setting in order to make observations from an "insider" perspective.

population: A defined group serving as the subject of a study.

positivist approach: A research approach based on the natural science model of knowledge utilizing a hypothetico-deductive formulation of the research question and quantitative data.

primary data: Data collected directly from firsthand experience.

qualitative data: Information based on interpretations of meaning.

quantitative data: Information from research collected in numerical form that can be counted.

random sample: A study's participants being randomly selected to serve as a representation of a larger population **reliability** a measure of a study's consistency that considers how likely results are to be replicated if a study is reproduced **research design** a detailed, systematic method for conducting research and obtaining data.

sample: Small, manageable number of subjects that represent the population.

scientific method: A systematic research method that involves asking a question, researching existing sources, forming a hypothesis, designing and conducting a study, and drawing conclusions.

secondary data analysis: Using data collected by others but applying new interpretations.

selective observation: Knowledge based on observations that only confirm what the observer expects or wants to see.

surveys: Data collections from subjects who respond to a series of questions about behaviours and opinions, often in the form of a questionnaire.

textually mediated communication: Institutional forms of communication that rely on written documents, texts, and paperwork.

traditional knowledge: Knowledge based on received beliefs or the way things have always been done.

validity: The degree to which a sociological measure accurately reflects the topic of study.

value neutrality: A practice of remaining impartial, without bias or judgment, during the course of a study and in publishing results.

variable: A characteristic or measure of a social phenomenon that can take different values.

Section Summary

2.1. Approaches to Sociological Research

Using the scientific method, a researcher conducts a study in five phases: asking a question, researching existing sources, formulating a hypothesis, conducting a study, and drawing conclusions. The scientific method is useful in that it provides a clear method of organizing a study. Some sociologists conduct scientific research through a positivist framework utilizing a hypothetico-deductive formulation of the research question. Other sociologists conduct scientific research by employing an interpretive framework that is often inductive in nature. Scientific sociological studies often observe relationships between variables. Researchers study how one variable changes another. Prior to conducting a study, researchers are careful to apply operational definitions to their terms and to establish dependent and independent variables.

2.2. Research Methods

Sociological research is a fairly complex process. As you can see, a lot goes into even a simple research design. There are many steps and much to consider when collecting data on human behaviour, as well as in interpreting and analyzing data in order to form conclusive results. Sociologists use scientific methods for good reason. The scientific method provides a system of organization that helps researchers plan and conduct the study while ensuring that data and results are reliable, valid, and objective. The many methods available to researchers—including experiments, surveys, field studies, and secondary data analysis—all come with advantages and disadvantages. The strength of a study can depend on the choice and implementation of the appropriate method of gathering research. Depending on the topic, a study might use a single method or a combination of methods. It is important to plan a research design before undertaking a study. The information gathered may in itself be surprising, and the study design should provide a solid framework in which to analyze predicted and unpredicted data.

2.3. Ethical Concerns

Sociologists and sociology students must take ethical responsibility for any study they conduct. They must first and foremost guarantee the safety of their participants. Whenever possible, they must ensure that participants have been fully informed before consenting to be part of a study. The Canadian Sociological Association (CSA) maintains ethical guidelines that sociologists must take into account as they conduct research. The guidelines address conducting studies, properly using existing sources, accepting funding, and publishing results. Sociologists must try to maintain value neutrality. They must gather and analyze data objectively, setting aside their personal preferences, beliefs, and opinions. They must report findings accurately, even if they contradict personal convictions.

Section Quiz

2.1. Approaches to Sociological Research

1. A measurement is considered _____ if it actually measures what it is intended to measure, according to the topic of the study.

    1. reliable
    2. sociological
    3. valid
    4. quantitative

2. Sociological studies test relationships in which change in one _____ causes change in another.

    1. test subject
    2. behaviour
    3. variable
    4. operational definition

3. In a study, a group of 10-year-old boys are fed doughnuts every morning for a week and then weighed to see how much weight they gained. Which factor is the dependent variable?

1. the doughnuts
2. the boys
3. the duration of a week
4. the weight gained

4. Which statement provides the best operational definition of "childhood obesity"?

1. children who eat unhealthy foods and spend too much time watching television and playing video games
2. a distressing trend that can lead to health issues including type 2 diabetes and heart disease
3. body weight at least 20 percent higher than a healthy weight for a child of that height
4. the tendency of children today to weigh more than children of earlier generations

2.2. Research Methods

5. Which materials are considered secondary data?

1. photos and letters given to you by another person
2. books and articles written by other authors about their studies
3. information that you have gathered and included in your results
4. responses from participants whom you both surveyed and interviewed

6. What method did Andrew Ivsins use to study crack cocaine users in Victoria?

1. survey
2. experiment
3. field research
4. content analysis

7. Why is choosing a random sample an effective way to select participants?

1. Participants do not know they are part of a study.
2. The researcher has no control over who is in the study.
3. It is larger than an ordinary sample.
4. Everyone has the same chance of being part of the study.

8. What research method did John S. Lynd and Helen Merrell Lynd mainly use in their *Middletown* study?

1. secondary data
2. survey
3. participant observation
4. experiment

9. Which research approach is best suited to the positivist approach?

1. questionnaire
2. case study
3. ethnography
4. secondary data analysis

10. The main difference between ethnography and other types of participant observation is:

1. Ethnography isn't based on hypothesis testing.
2. Ethnography subjects are unaware they're being studied.
3. Ethnographic studies always involve minority ethnic groups.
4. There is no difference.

11. Which best describes the results of a case study?

1. It produces more reliable results than other methods because of its depth.
2. Its results are not generally applicable.
3. It relies solely on secondary data analysis.
4. All of the above.

12. Using secondary data is considered an unobtrusive or _____ research method.

1. nonreactive
2. nonparticipatory
3. nonrestrictive
4. nonconfrontive

2.3. Ethical Concerns

13. Which statement illustrates value neutrality?

1. Obesity in children is obviously a result of parental neglect; therefore, schools should take a greater role in preventing it.
2. In 2003, states like Arkansas adopted laws requiring elementary schools to remove soft drink vending machines from schools.
3. Merely restricting children's access to junk food at school is not enough to prevent obesity.
4. Physical activity and healthy eating are a fundamental part of a child's education.

14. Which person or organization defined the concept of value neutrality?

1. Institutional Review Board (IRB)
2. Peter Rossi
3. Canadian Sociological Association (CSA)
4. Max Weber

15. To study the effects of fast food on lifestyle, health, and culture, from which group would a researcher ethically be unable to accept funding?

1. a fast-food restaurant
2. a nonprofit health organization
3. a private hospital
4. a governmental agency like Health and Social Services

[Quiz answers at the end of the chapter]

Short Answer

2.1. Approaches to Sociological Research

1. Write down the first three steps of the scientific method. Think of a broad topic that you are interested in and which would make a good sociological study—for example, ethnic diversity in a college, homecoming rituals, athletic scholarships, or teen driving. Now, take that topic through the first steps of the process. For each step, write a few sentences or a paragraph: 1) Ask a question about the topic. 2) Do some research and write down the titles of some articles or books you'd want to read about the topic. 3) Formulate a hypothesis.

2.2.Research Methods

1. What type of data do surveys gather? For what topics would surveys be the best research method? What drawbacks might you expect to encounter when using a survey? To explore further, ask a research question and write a hypothesis. Then create a survey of about six questions relevant to the topic. Provide a rationale for each question. Now define your population and create a plan for recruiting a random sample and administering the survey.
2. Imagine you are about to do field research in a specific place for a set time. Instead of thinking about the topic of study itself, consider how you, as the researcher, will have to prepare for the study. What personal, social, and physical sacrifices will you have to make? How will you manage your personal effects? What organizational equipment and systems will you need to collect the data?
3. Create a brief research design about a topic in which you are passionately interested. Now write a letter to a philanthropic or grant organization requesting funding for your study. How can you describe the project in a convincing yet realistic and objective way? Explain how the results of your study will be a relevant contribution to the body of sociological work already in existence.

2.3. Ethical Concerns

1. Why do you think the CSA crafted such a detailed set of ethical principles? For reference, see the Canadian Sociological Association's *Statement of Professional Ethics* (2012) [PDF] at https://www.csa-scs.ca/files/www/csa/documents/codeofethics/2012Ethics.pdf. What type of study could put human participants at risk? Think of some examples of studies that might be harmful. Do you think that, in the name of sociology, some researchers might be tempted to cross boundaries that threaten human rights? Why?
2. Would you willingly participate in a sociological study that could potentially put your health and safety at risk, but had the potential to help thousands or even hundreds of thousands of people? For example, would you participate in a study of a new drug that could cure diabetes or cancer, even if it meant great inconvenience and physical discomfort for you, or possible permanent damage?

Further Research

2.1. Approaches to Sociological Research
For a historical perspective on the scientific method in sociology, read "The Elements of Scientific Method in Sociology" by F. Stuart Chapin (1914) in the *American Journal of Sociology*: https://archive.org/details/jstor-2763363

2.2. Research Methods
Information on current real-world sociology experiments: https://revisesociology.com/2016/08/12/field-experiments-examples/

2.3. Ethical Concerns Founded in 1966, the CSA is a nonprofit organization located in Montreal, Quebec, with a membership of 900 researchers, faculty members, students, and practitioners of sociology. Its mission is to promote "research, publication and teaching in Sociology in Canada." Learn more about the Canadian Sociological Association at http://www.csa-scs.ca/.

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Solutions to Section Quiz

1 C, | 2 C, | 3 D, | 4 C, | 5 B, | 6 C, | 7 D, | 8 C, | 9 A, | 10 A, | 11 B, | 12 A, | 13 B, | 14 D, | 15 A, [Return to Quiz]

Image Attributions

Figure 2.9. Hawthorne Works factory of the Western Electric Company, 1925. By Western Electric Company (Western Electric Company Photograph Album, 1925.) [Public domain], via Wikimedia Commons. https://commons.wikimedia.org/wiki/File:Hawthorne,_Illinois_Works_of_the_Western_Electric_Company,_1925.jpg

Figure 2.10. Didn't they abolish the mandatory census? Then what's this? by Khosrow Ebrahimpour (https://www.flickr.com/photos/xosrow/5685345306/in/photolist-9EoT5W-ow4tdu-oeGG4m-oeMEcK-oy2jM2-ovJC8w-oePSRQ-9J2V24-of1Hnu-of243u-of2K2B-of2FHn-owiBSA-owtQN3-of1Ktd-oitLSC-oeVJte-oep8KX-ovEz8w-oeohhF-oew5Xb-oewdWN-owavju-oeMEnV-oweLcN-ovEPGG-ovAQUX-oeo2eL-oeo3Fd-oeoqxh-oxCKnv used under CC BY 2.0 (https://creativecommons.org/licenses/by/2.0/)

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Figure 2.15. Muncie, Indiana High School: 1917 by Don O'Brien (https://www.flickr.com/photos/dok1/3694125269/) used under CC BY 2.0 license (https://creativecommons.org/licenses/by/2.0/)

Long Descriptions

Figure 2.5 Long Description: The Scientific Method has a series of steps which can form a repeating cycle.

1. Ask a question.
2. Research existing sources
3. Formulate a hypothesis.
4. Design and conduct a study

5. Draw conclusions.
6. Report results.

[Return to Figure 2.5]

Figure 2.17 Long Description:

> A sociology for women would offer a knowledge of the social organization and determinations of the properties and events of our directly experienced world.

[Return to Figure 2.17]

Figure 2.18 Long description: Different Research Methods: Textual analysis uses qualitative data and is highly reliable. Participant observation uses qualitative data and is a unique observation. Experiments and survey research use quantitative data and are highly reliable. Journalism uses quantitative data and is a unique observation. [Return to Figure 2.18]

3

Chapter 3. Culture



Figure 3.1. Graffiti's mix of colourful drawings, words, and symbols is a vibrant expression of culture—or, depending on one's viewpoint, a disturbing expression of the creator's lack of respect for a community's shared space. (Photo courtesy of aikijuanma/ Flickr)

Learning Objectives

3.1. What Is Culture?

- Differentiate between culture and society.
- Distinguish between biological and cultural explanations of human behaviour.
- Compare and contrast cultural universalism, cultural relativism, ethnocentrism, and androcentrism.
- Examine the policy of multiculturalism as a solution to the problem of diversity.

3.2. Elements of Culture

- Understand the basic elements of culture: values, beliefs, and norms.
- Explain the significance of symbols and language to a culture.
- Describe the Sapir-Whorf hypothesis.
- Distinguish material and nonmaterial culture.

3.3. Culture as Innovation: Pop Culture, Subculture, and Global Culture

- Distinguish two modes of culture: innovation and restriction.
- Discuss the distinction between high culture, pop culture, and postmodern culture.
- Differentiate between subculture and counterculture.
- Understand the role of globalization in cultural change and local lived experience.

3.4. Culture as Restriction: Rationalization and Commodification

- Describe culture as a form of restriction on social life.
- Explain the implications of rationalization and consumerism.

3.5. Theoretical Perspectives on Culture

- Discuss the major theoretical approaches to cultural interpretation.

Introduction to Culture



Figure 3.2. Fast food nation. (Photo courtesy of Jon Bunting/ Flickr)

Are there rules for eating at McDonald's? Generally, we do not think about rules in a fast food restaurant because they are designed to be casual, quick, and convenient. But if you look around one on a typical weekday, you will see people acting as if they were trained for the role of fast food customer. They stand in line, pick their items from overhead menus before they order, swipe debit cards to pay, and stand to one side to collect trays of food. After a quick meal, customers wad up their paper wrappers and toss them into garbage cans. This is a food system that has become highly rationalized in Max Weber's terms. Customers' movement through this fast food routine is orderly and predictable, even if no rules are posted and no officials direct the process.

If you want more insight into these unwritten rules, think about what would happen if you behaved according to some other standards. (You would be doing what sociologists call a "breaching experiment" in ethnomethodology*:* deliberately disrupting social norms in order to learn about them.) For example: call ahead for reservations; ask the cashier detailed questions about the food's ingredients or how it is prepared; barter over the price of the burgers; ask to have your meal served to you at your table; or throw your trash on the ground as you leave. Chances are you will elicit hostile responses from the restaurant employees and your fellow customers. Although the rules are not written down, you will have violated deep seated tacit norms that govern behaviour in fast food restaurants.

This example reflects a broader theme in the culture of food and diet. What are the rules that govern what, when, and how we eat? Michael Pollan (b. 1955), for example, contrasts the North American culture of fast food with the intact traditions of eating sit-down, family meals that still dominate in France and other European nations (2006). Despite eating foods that many North Americans think of as unhealthy — butter, wheat, triple-cream cheese, foie gras, wine, etc. — the French, as a whole, remain healthier and thinner than North Americans.

> The French eat all sorts of supposedly unhealthy foods, but they do it according to a strict and stable set of rules: They eat small portions and don't go back for seconds; they don't snack; they seldom eat alone; and communal meals are long, leisurely affairs. (Pollan, 2006)

Their cultural rules fix and constrain what people consider as food and how people consume food. The national cuisine and eating habits of France are well established, oriented to pleasure and tradition, and as Pollan argues, well integrated into French cultural life as a whole.

In North America, on the other hand, fast food is just the tip of an iceberg with respect to a larger crisis of diet in which



Figure 3.3. French dessert of raspberry crème brulee. Does a nation's cuisine represent a rule-bound tradition, an innovative and inventive art, or both? (Photo courtesy of Йоана Петрова/ Flickr)

increasing levels of obesity and eating disorders are coupled with an increasing profusion of health diets, weight reducing diets, and food fads. While an alarming number of North American meals are eaten in cars (19 percent, according to Pollan), the counter-trend is the obsession with nutritional science. Instead of an orientation to food based on cultural tradition and pleasure, people are oriented to food in terms of its biochemical constituents (calories, proteins, carbohydrates, vitamins, omega fatty acids, saturated and unsaturated fats, etc.). There are Atkins diets, zone diets, Mediterranean diets, paleolithic diets, vegan diets, gluten free diets, Weight Watchers diets, raw food diets, etc.; an endless proliferation that Pollan attributes to a fundamental anxiety that North Americans have about food and health. While each type of diet claims scientific evidence to support its health and other claims, evidence which is disturbingly contradictory, essentially the choice of diet revolves around the cultural meanings attributed to food and its nutritional components:

> that taste is not a true guide to what should be eaten; that one should not simply eat what one enjoys; that the important components of food cannot be seen or tasted, but are discernible only in scientific laboratories; and that experimental science has produced rules of nutrition that will prevent illness and encourage longevity. (Levenstein as cited in Pollan, 2006)

It is important to note that food culture and diet are not infinitely malleable, however. There is an underlying biological reality of nutrition that defines the parameters of dietary choice. In his documentary *Super Size Me* (2004), Morgan Spurlock conducted a version of the sociological participant observation study by committing himself to eating only McDonald's food for 30 days. As a result, he gained 24 pounds, increased his cholesterol and fat accumulation in his liver, and experienced mood swings and sexual dysfunction. It is clear that one cannot survive on fast food alone; although many teenagers and university students have been known to try.

Sociologists would argue, therefore, that everything about fast food restaurants, choice of diet, and habits of food consumption reflects **culture**, the beliefs and behaviours that a social group shares. Diet is a product of culture. It is a product of the different meanings we attribute to food and to the relationship we have with our bodies. The significant point is that while diet is a response to the fundamental conditions of biological life, diet is also a tremendous site of innovation and diversity. Culture in general is a site of two opposing tendencies: one is the way that cultures around the world lay down sets of rules or norms which constrain, restrict, habitualize, and fix forms of life; the other is the way that cultures produce endlessly innovative and diverse solutions to problems like nutrition. Cultures both constrain and continually go beyond constraints.

This raises the distinction between the terms "culture" and "society" and how sociologists conceptualize the relationship between them. In everyday conversation, people rarely distinguish between these terms, but they have slightly different meanings, and the distinction is important to how sociologists examine culture. If **culture** refers to the beliefs, artifacts, and ways of life that a social group shares, a **society** is a group that interacts within a common bounded territory or



Figure 3.4. Kentucky Fried Chicken instant mashed potato, 1974. (Photo courtesy of Roadsidepictures/ Flickr)

region. To clarify, a culture represents the beliefs, practices, and material artifacts of a group, while a society represents the social structures, processes, and organization of the people who share those beliefs, practices, and material artifacts. Neither society nor culture could exist without the other, but we can separate them analytically.

In this chapter, we examine the relationship between culture and society in greater detail, paying special attention to the elements and forces that shape culture, including diversity and cultural changes. A final discussion touches on the different theoretical perspectives from which sociologists research culture.

3.1. What Is Culture?



Figure 3.5. What is culture? (Image courtesy of Chris Jones/ Flickr)

Humans are social creatures. Since the dawn of *Homo sapiens*, nearly 200,000 years ago, people have grouped together into communities in order to survive. Living together, people developed forms of cooperation which created the common habits, behaviours, and ways of life known as culture — from specific methods of childrearing to preferred techniques for obtaining food. Peter Berger (b. 1929) argued that this is the result of a fundamental human predicament (1967).

Unlike other animals, humans lack the biological programming to live on their own. They require an extended period of dependency in order to survive in the environment. The creation of culture makes this possible by providing a protective shield against the harsh impositions of nature. Culture provides the ongoing stability that enables human existence. This means, however, that the human environment is not nature *per se* but culture itself.

Over the history of humanity, this has lead to an incredible diversity in how humans have imagined and lived life on Earth, the sum total of which Wade Davis (b. 1953) has called the **ethnosphere**. The ethnosphere is the entirety of all cultures' "ways of thinking, ways of being, and ways of orienting oneself on the Earth" (Davis, 2007). It is our collective cultural heritage as a species. A single culture, as the sphere of meanings shared by a single social group, is the means by which that group makes sense of the world and of each other. But there are many cultures and many ways of making sense of the world. Through a multiplicity of cultural inventions, human societies have adapted to the environmental and biological conditions of human existence in many different ways. What do we learn from this?

Firstly, almost every human behaviour, from shopping to marriage to expressions of feelings, is learned. In Canada, people tend to view marriage as a choice between two people based on mutual feelings of love. In other nations and in other times, marriages have been arranged through an intricate process of interviews and negotiations between entire families, or in other cases, through a direct system such as a mail-order bride. To someone raised in Winnipeg, the marriage customs of a family from Nigeria may seem strange or even wrong. Conversely, someone from a traditional Kolkata family might be perplexed with the idea of romantic love as the foundation for the lifelong commitment of marriage. In other words, the way in which people view marriage depends largely on what they have been taught. Being familiar with these written and unwritten rules of culture helps people feel secure and "normal." Most people want to live their daily lives confident that their behaviours will not be challenged or disrupted. Behaviour based on learned customs is, therefore, not a bad thing, but it does raise the problem of how to respond to cultural differences.

Secondly, culture is innovative. The existence of different cultural practices reveals the way in which societies find different solutions to real life problems. The different forms of marriage are various solutions to a common problem, the problem of organizing families in order to raise children and reproduce the species. The basic problem is shared by the different societies, but the solutions are different. This illustrates the point that culture in general is a means of solving problems. It is a tool composed of the capacity to abstract and conceptualize, to cooperate and coordinate complex collective endeavours, and to modify and construct the world to suit human purposes. It is the repository of creative solutions, techniques, and technologies humans draw on when confronting the basic shared problems of human existence. Culture is, therefore, key to the way humans, as a species, have successfully adapted to the environment. The existence of different cultures refers to the different means by which humans use innovation to free themselves from biological and environmental constraints.

Thirdly, culture is also restraining. Cultures retain their distinctive patterns through time. In global capitalism, although Canadian culture, French culture, Malaysian culture and Kazakhstani culture will share certain features like rationalization and commodification, they also differ in terms of languages, beliefs, dietary practices, and other ways of life. They adapt and respond to capitalism in unique manners according to their specific shared heritages. Local cultural forms have the capacity to restrain the changes produced by globalization. On the other hand, the diversity of local cultures is increasingly limited by the homogenizing pressures of globalization. Economic practices that prove inefficient or uncompetitive in the global market disappear. The meanings of cultural practices and knowledges change as they are turned into commodities for tourist consumption or are patented by pharmaceutical companies. Globalization increasingly restrains cultural forms, practices, and possibilities.

There is a dynamic within culture of innovation and restriction. The cultural fabric of shared meanings and orientations that allows individuals to make sense of the world and their place within it can either change with contact with other cultures or with changes in the socioeconomic formation, allowing people to reinvision and reinvent themselves, or it can remain rigid and restrict change. Many contemporary issues to do with identity and belonging, from multiculturalism and hybrid identities to religious fundamentalism, can be understood within this dynamic of innovation and restriction. Similarly, the effects of social change on ways of life, from the new modes of electronic communication to failures to respond to climate change, involve a tension between innovation and restriction.



Figure 3.6. The cultural norms governing public transportation vary in Canada, Austria, Mumbai, and Tokyo. How would a visitor from a rural Canadian town act and feel on this crowded Tokyo train? (Photo courtesy of simonglucas/Flickr)

Making Connections: Sociological Concepts

"Yes, but what does it mean?"

The premise we will be exploring in this chapter is that the human world, unlike the natural world, cannot be understood unless its meaningfulness is taken into account. Human experience is essentially meaningful, and culture is the source of the meanings that humans share. What are the consequences of this emphasis on the meaningfulness of human experience? What elements of social life become visible if we focus on the social processes whereby meanings are produced and circulated?

Culture is the term used to describe this dimension of meaningful collective existence. Culture refers to the shared symbols that people create to solve real-life problems. What this perspective entails is that human experience is essentially meaningful or cultural. Human social life is necessarily conducted through the meanings humans attribute to things, actions, others, and themselves. In a sense, people do not live in direct, immediate contact with the world and each other; instead, they live only indirectly through the medium of the shared meanings provided by culture. This mediated experience is the experience of culture. As the philosopher Martin Heidegger put it, humans live in an "openness" granted by language and by their ability to respond to the meaningfulness of things in a way that other living beings do not. The sociology of culture is, therefore, concerned with the study of how things and actions assume meanings, how these meanings orient human behaviour, and how social life is organized around and through meaning.



Figure 3.7. In the teaching of traditional Chinese acupuncture, meanings are literally written on the human body (Photo courtesy of Tomas Fano/Flickr)

What is the "meaning of meaning" in social life, therefore? Max Weber notes that it is possible to imagine situations in which human experience appears direct and unmediated; for example, someone taps your knee and your leg jerks forward, or you are riding your bike and get hit by a car (1968, pp. 94–96). In these situations, experience seems purely physical, unmediated. Yet when we assimilate these experiences into our lives, we do so by making them meaningful events. By tapping your knee, the doctor is looking for signs that indicate the functioning of your nervous system. She or he is literally reading the reactions as symbolic events and assigning them meaning within the context of an elaborate cultural map of meaning: the modern biomedical understanding of the body. It is quite possible that if you were flying through the air after being hit by a car, you would not be thinking or attributing meaning to the event. You would be simply a physical projectile. But afterwards, when you reconstruct the story for your friends, the police, or the insurance company, the event would become part of your life through this narration of what happened.

Equally important to note here is that the meaning of these events changes depending on the cultural context. A doctor of traditional Chinese medicine would read the knee reflex differently than a graduate of the UBC medical program. The story and meaning of the car accident changes if it is told to a friend as opposed to a policeman or an insurance adjuster.

The problem of meaning in sociological analysis, then, is to determine how events or things acquire meaning (e.g., through the reading of symptoms or the telling of stories); how the true or right meanings are determined (e.g., through biomedically-based diagnoses or juridical procedures of determining responsibility); how meaning works in the organization of social life (e.g., through the medicalized relation to our bodies or the norms of traffic circulation); and how humans gain the capacity to interpret and share meanings in the first place (e.g., through the process of socialization into medical, legal, insurance, and traffic systems). Sociological research into culture studies all of these problems of meaning.

Culture and Biology

The central argument put forward in this chapter is that human social life is essentially meaningful and, therefore, has to be understood first through an analysis of the cultural practices and institutions that produce meaning. Nevertheless, a fascination in contemporary culture persists for finding biological or genetic explanations for complex human behaviours that would seem to contradict the emphasis on culture.

In one study, Swiss researchers had a group of women smell unwashed T-shirts worn by different men. The researchers argued that sexual attraction had a biochemical basis in the histo-compatibility signature that the women detected in the male pheromones left behind on the T-shirts. Women were attracted to the T-shirts of the men whose immune systems differed from their own (Wedekind et al., 1995). In another study, Dean Hamer (b. 1951) and his colleagues discovered that some homosexual men possessed the same region of DNA on their X chromosome, which led them to argue that homosexuality was determined genetically by a "gay gene" (Hamer et al., 1993). Another study found that the corpus

callosum, the region of nerve fibres that connect the left and right brain hemispheres, was larger in women's brains than in men's (De Lacoste-Utamsing & Holloway, 1982). Therefore, women were thought to be able to use both sides of their brains simultaneously when processing visuo-spatial information, whereas men used only their left hemisphere. This finding was said to account for gender differences that ranged from women's supposedly greater emotional intuition to men's supposedly greater abilities in math, science, and parallel parking. In each of these three cases, the authors reduced a complex cultural behaviour — sexual attraction, homosexuality, cognitive ability — to a simple biological determination.

In each of these studies, the scientists' claims were quite narrow and restricted in comparison to the conclusions drawn from them in the popular media. Nevertheless, they follow a logic of explanation known as **biological determinism**, which argues that the forms of human society and human behaviour are determined by biological mechanisms like genetics, instinctual behaviours, or evolutionary advantages. Within sociology, this type of framework underlies the paradigm of **sociobiology**, which provides biological explanations for the evolution of human behaviour and social organization.

Sociobiological propositions are constructed in three steps (Lewontin, 1991). First they identify an aspect of human behaviour which appears to be universal, common to all people in all times and places. In all cultures the laws of sexual attraction — who is attracted to whom — are mysterious, for example. Second, they assume that this universal trait must be coded in the DNA of the species. There is a gene for detecting histo-compatibility that leads instinctively to mate selection. Third, they make an argument for why this behaviour or characteristic increases the chances of survival for individuals and, therefore, creates reproductive advantage. Mating with partners whose immune systems complement your own leads to healthier offspring who survive to reproduce your genes. The implication of the sociobiological analysis is that these traits and behaviours are fixed or "hard wired" into the biological structure of the species and are, therefore, very difficult to change. People will continue to be attracted to people who are not "right" for them in all the ways we would deem culturally appropriate — psychologically, emotionally, socially compatible, etc. — because they are biologically compatible.



Figure 3.8. Is male aggression innate? (Image courtesy of Riccardo Cuppini/Flickr)

Despite the popularity of this sort of reason, it is misguided from a sociological perspective for a number of reasons. For example, Konrad Lorenz's (1903-1989) arguments that human males have an innate biological aggressive tendency to fight for scarce resources and protect territories were very popular in the 1960s (1966). The dilemma he posed was that males' innate tendency towards aggression as a response to external threats might be a useful trait on an evolutionary scale, but in a contemporary society that includes the development of weapons of mass destruction, it is a threat to human survival. Another implication of his argument was that if aggression is instinctual, then the idea that individuals, militant groups, or states could be held responsible for acts of violence or war loses its validity. (Note here that Lorenz's basic claim about

aggression runs counter to the stronger argument that, if anything, the tendency toward co-operation has been central to the survival of human social life from its origins to the present).

However, a central problem of sociobiology as a type of sociological explanation is that while human biology does not vary greatly throughout history or between cultures, the forms of human association do vary extensively. It is difficult to account for the variability of social phenomena by using a universal biological mechanism to explain them. Even something like the aggressive tendency in males, which on the surface has an intuitive appeal, does not account for the multitude of different forms and practices of aggression, let alone the different social circumstances in which aggression is manifested or provoked. It does not account for why some men are aggressive sometimes and not at other times, or why some men are not aggressive at all. It does not account for women's aggression and the forms in which this typically manifests. If testosterone is the key mechanism of male aggression, it does not account for the fact that both men and women generate testosterone in more or less equal quantities. Nor does it explain the universal tendencies of all societies to develop sanctions and norms to curtail violence. To suggest that aggression is an innate biological characteristic means that it does not vary greatly throughout history, nor between cultures, and is impervious to the social rules that restrict it in all societies. Ultimately, this means that there is no point in trying change it despite the evidence that aggression in individuals and societies can be changed.



Figure 3.9. The baby's smile: instinctive or learned? (Photo courtesy of Llee Wu/Flickr)

The main consideration to make here is not that biology has no impact on human behaviour, but that the biological explanation is limited with respect to what it can explain about complex cultural behaviours and practices. For example, research has shown that newborns and fetuses as young as 26 weeks have a simple smile: "the face relaxes while the sides of the mouth stretch outward and up" (Fausto-Sterling, 2000). This observation about a seemingly straightforward biological behaviour suggests that smiling is inborn, a muscular reflex based on neurological connections. However, the smile of the newborn is not used to convey emotions. It occurs spontaneously during rapid eye movement (REM) sleep. Only when the baby matures and begins to interact with his or her environment and caretakers does the smile begin to represent a response to external stimuli. By age one, the baby's smile conveys a variety of meanings, depending on the social context, including flirting and mischief. Moreover, from the age of 6 months to 2 years, the smile itself changes physically: Different muscle groups are used, and different facial expressions are blended with it (surprise, anger, excitement). The smile becomes more complex and individualized. The point here, as Anne Fausto-Sterling points out, is that "the child uses smiling as part of a complex system of communication" (2000). Not only is the meaning of the smile defined in interaction with the social context, but the physiological components of smiling (the nerves, muscles, and stimuli) also are modified and "socialized" according to culture.

Therefore, social scientists see explanations of human behaviour based on biological determinants as extremely limited in scope and value. The physiological "human package" — bipedalism, omnivorous diet, language ability, brain size, capacity for empathy, lack of an estrous cycle (Naiman, 2012) — is more or less constant across cultures; whereas, the range of cultural behaviours and beliefs is extremely broad. These sometimes radical differences between cultures have to

be accounted for instead by their distinct processes of socialization through which individuals learn how to participate in their societies. From this point of view, as the anthropologist Margaret Mead (1901-1978) put it:

> We are forced to conclude that human nature is almost unbelievably malleable, responding accurately and contrastingly to contrasting cultural conditions. The differences between individuals who are members of different cultures, like the differences between individuals within a culture, are almost entirely to be laid to differences in conditioning, especially during early childhood, and the form of this conditioning is culturally determined (1935).

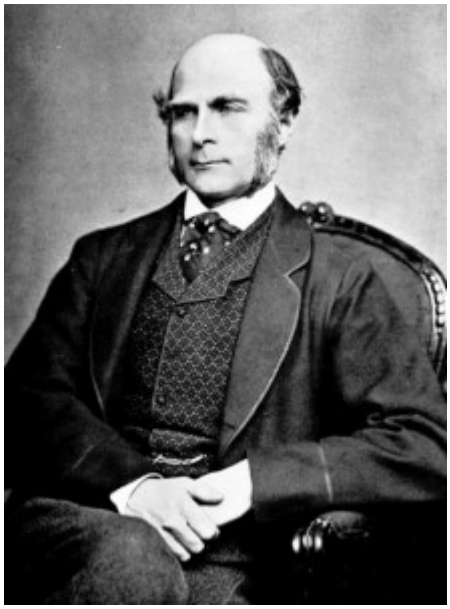


Figure 3.10. Francis Galton, a cousin of Charles Darwin, was the founder of eugenics (Image coutesy of Wikimedia Commons).

Aside from the explanatory problems of biological determinism, it is important to bear in mind the social consequences of biological determinism, as these ideas have been used to support rigid cultural ideas concerning race, gender, disabilities, etc. that have their legacy in slavery, racism, gender inequality, eugenics programs, and the sterilization of "the unfit." **Eugenics**, meaning "well born" in ancient Greek, was a social movement that sought to improve the human "stock" through selective breeding and sterilization. Its founder, Francis Galton (1822-1911) defined eugenics in 1883 as "the study of the agencies under social control that may improve or impair the racial qualities of future generations, either physically or mentally" (Galton as cited in McLaren, 1990). In Canada, eugenics boards were established by the governments of Alberta and British Columbia to enable the sterilization of the "feeble-minded." Based on a rigid cultural concept of what a proper human was, and grounded in the biological determinist framework of evolutionary science, 4,725 individuals were proposed for sterilization in Alberta and 2,822 of them were sterilized between 1928 and 1971. The racial component of the program is evident in the fact that while First Nations and Métis peoples made up only 2.5% of the population of Alberta, they accounted for 25% of the sterilizations. Several hundred individuals were also sterilized in British Columbia between 1933 and 1979 (McLaren, 1990).

The interesting question that these biological explanations of complex human behaviour raise is: Why are they so popular? What is it about our culture that makes the biological explanation of behaviours or experiences like sexual attraction, which we know from personal experience to be extremely complicated and nuanced, so appealing? As micro-biological technologies like genetic engineering and neuro-pharmaceuticals advance, the very real prospect of altering the human body at a fundamental level to produce culturally desirable qualities (health, ability, intelligence, beauty, etc.) becomes possible, and, therefore, these questions become more urgent.

Making Connections: Sociology in the Real World

The Pop Gene



Figure 3.11. Coding region in a segment of eukaryotic DNA (Image courtesy of National Human Genome Research Institute/ Wikimedia Commons)

The concept of the gene and the idea of genetic engineering have entered into popular consciousness in a number of strange and interesting ways, which speak to our enduring fascination with biological explanations of human behaviour. Some sociologists have begun to speak of a new eugenics movement in reference to the way the mapping and testing of the genome makes it possible, as a matter of consumer choice, to manipulate the genes of a foetus or an egg to eliminate what are considered birth "defects" or to produce what are considered desired qualities in a child. If the old eugenics movement promoted selective breeding and forced sterilization in order to improve the biological qualities and, in particular, the racial qualities of whole populations, the new eugenics is focused on calculations of individual risk or individual self-improvement and self-realization. In the new eugenics, individuals choose to act upon the genetic information provided by doctors, geneticists, and counsellors to make decisions for their children or themselves (Rose, 2007).

This movement is based both on the commercial aspirations of biotechnology companies and the logic of a new biological determinism or **geneticism**, which suggests that the qualities of human life are caused by genes (Rose, 2007). The concept of the gene is a relatively recent addition to the way in which people begin to think about themselves in relationship to their bodies. The German historians Barbara Duden and Silja Samerski argue that the gene has become a kind of primordial reference point for the fundamental questions people ask about themselves (2007): Where do I come from; who am I; and what will happen to me in the future? The gene has shifted from its specific place within the parameters of medical science to become a source of popular understanding and speculation: a "pop gene." Most tellingly, the gene has become a Trojan horse through which "risk consciousness" is implanted in people's bodies. The popularization of the idea of the gene entails the development of a new relationship to the human body, health, and the genetic predispositions to health risks as we age.

In 2013, the movie star Angelina Jolie underwent a double mastectomy, not because she had breast cancer but because doctors estimated she had an 87 percent chance of developing breast cancer due to a mutation in the BRCA1 gene (Jolie, 2013). On the basis of what might happen to her based on probabilities of risk from genetic models she decided to take drastic measures to avoid the breast cancer that her mother died of. Her very public stance on her surgery was to raise public awareness of the genetic risks of cancers that run in families and to normalize a medical procedure that many would be hesitant to take. At the same time she further implanted a notion of the gene as a site of

invisible risk in peoples lives, encouraging more people to think about themselves in terms of their hidden dispositions to genetically programmed diseases.



Figure 3.12. Angelina Jolie (2013): "My doctors estimated that I had an 87 percent risk of breast cancer and a 50 percent risk of ovarian cancer, although the risk is different in the case of each woman". (Photo courtesy of Hot Gossip Italia/Flickr)

Many misconceptions exist in popular culture about what a gene actually is or what it can do. Some of these misconceptions are funny — Duden and Samerski cite a hairdresser they interviewed as saying that her nail biting habit was part of the nature she was born with — but some of them have serious consequences that can lead to the impossible decisions some individuals, including couples who are having a child, are forced to make. Informed decision making in genetic counselling often works with statistical probabilities of "defects" based on population data (e.g., "With your family history, you have a 1 in 10 chance of having a child with the genetic mutation for Down's syndrome"), but what does this mean to a particular individual? The actual *causal* mechanism for that particular individual is unknown (i.e., it is unlikely that they will actually have 10 children, one of whom might have Down's syndrome); therefore, what does this probability figure mean to someone who is pregnant? In this sense, the gene defines a set of cultural parameters by which people in the age of genetics make sense of themselves in relationship to their bodies. Like biological determinism in general, the gene introduces a kind of fatalism into the understanding of human life and human possibility.

Cultural Universals

Often, a comparison of one culture to another will reveal obvious differences. But all cultures share common elements. **Cultural universals** are patterns or traits that are globally common to all societies. One example of a cultural universal is the family unit: Every human society recognizes a family structure that regulates sexual reproduction and the care of children. Even so, how that family unit is defined and how it functions vary. In many Asian cultures, for example, family members from all generations commonly live together in one household. In these cultures, young adults will continue to live in the extended household family structure until they marry and join their spouse's household, or they may remain and raise their nuclear family within the extended family's homestead. In Canada, by contrast, individuals are expected to leave home and live independently for a period before forming a family unit consisting of parents and their offspring.

Anthropologist George Murdock (1897-1985) first recognized the existence of cultural universals while studying systems of kinship around the world. Murdock found that cultural universals often revolve around basic human survival, such as finding food, clothing, and shelter, or around shared human experiences, such as birth and death, or illness and healing. Through his research, Murdock identified other universals including language, the concept of personal names, and, interestingly, jokes. Humour seems to be a universal way to release tensions and create a sense of unity among people (Murdock, 1949). Sociologists consider humour necessary to human interaction because it helps individuals navigate otherwise tense situations.

Making Connections: Sociological Research

Is Music a Cultural Universal?



Figure 3.13. Queenscliff Music Festival 2013 (Image courtesy of Tony Proudfoot/Flickr)

Imagine that you are sitting in a theatre, watching a film. The movie opens with the hero sitting on a park bench with a grim expression on her face. Cue the music. The first slow and mournful notes are played in a minor key. As the melody continues, the hero turns her head and sees a man walking toward her. The music slowly gets louder, and the dissonance of the chords sends a prickle of fear running down your spine. You sense that she is in danger.

Now imagine that you are watching the same movie, but with a different soundtrack. As the scene opens, the music is soft and soothing with a hint of sadness. You see the hero sitting on the park bench and sense her loneliness. Suddenly, the music swells. The woman looks up and sees a man walking toward her. The music grows fuller, and the pace picks up. You feel your heart rise in your chest. This is a happy moment.

Music has the ability to evoke emotional responses. In television shows, movies, and even commercials, music elicits laughter, sadness, or fear. Are these types of musical cues cultural universals?

In 2009, a team of psychologists, led by Thomas Fritz of the Max Planck Institute for Human Cognitive and Brain Sciences in Leipzig, Germany, studied people's reactions to music they'd never heard (Fritz et al., 2009). The research team travelled to Cameroon, Africa, and asked Mafa tribal members to listen to Western music. The tribe, isolated from Western culture, had never been exposed to Western culture and had no context or experience within which to interpret its music. Even so, as the tribal members listened to a Western piano piece, they were able to recognize three basic emotions: happiness, sadness, and fear. Music, it turns out, is a sort of universal language.

Researchers also found that music can foster a sense of wholeness within a group. In fact, scientists who study the evolution of language have concluded that originally language (an established component of group identity) and music were one (Darwin, 1871). Additionally, since music is largely nonverbal, the sounds of music can cross societal boundaries more easily than words. Music allows people to make connections where language might be a more difficult barricade. As Fritz and his team found, music and the emotions it conveys can be cultural universals.

Ethnocentrism and Cultural Relativism

Despite how much humans have in common, cultural differences are far more prevalent than cultural universals. For example, while all cultures have language, analysis of particular language structures and conversational etiquette reveals tremendous differences. In some Middle Eastern cultures, it is common to stand close to others in conversation. North Americans keep more distance, maintaining a large personal space. Even something as simple as eating and drinking varies greatly from culture to culture. If your professor comes into an early morning class holding a mug of liquid, what do you

assume she is drinking? In Canada, it's most likely filled with coffee, not Earl Grey tea, a favourite in England, or yak butter tea, a staple in Tibet.

The way cuisines vary across cultures fascinates many people. Some travellers, like celebrated food writer Anthony Bourdain, pride themselves on their willingness to try unfamiliar foods, while others return home expressing gratitude for their native culture's fare. Canadians might express disgust at other cultures' cuisine, thinking it is gross to eat meat from a dog or guinea pig for example, while they do not question their own habit of eating cows or pigs. Such attitudes are an example of **ethnocentrism**, or evaluating and judging another culture based on how it compares to one's own cultural norms. Ethnocentrism, as sociologist William Graham Sumner (1840-1910) described the term, involves a belief or attitude that one's own culture is better than all others (1906). Almost everyone is a little bit ethnocentric. For example, Canadians tend to say that people from England drive on the "wrong" side of the road, rather than the "other" side. Someone from a country where dogs are considered dirty and unhygienic might find it off-putting to see a dog in a French restaurant.

A high level of appreciation for one's own culture can be healthy; a shared sense of community pride, for example, connects people in a society. But ethnocentrism can lead to disdain or dislike for other cultures, causing misunderstanding and conflict. People with the best intentions sometimes travel to a society to "help" its people, seeing them as uneducated or backward, essentially inferior. In reality, these travellers are guilty of cultural imperialism — the deliberate imposition of one's own cultural values on another culture. Europe's colonial expansion, begun in the 16th century, was often accompanied by a severe cultural imperialism. European colonizers often viewed the people in the lands they colonized as uncultured savages who were in need of European governance, dress, religion, and other cultural practices. On the West Coast of Canada, the Aboriginal *potlatch* (gift-giving) ceremony was made illegal in 1885 because it was thought to prevent Aboriginal peoples from acquiring the proper industriousness and respect for material goods required by civilization. A more modern example of **cultural imperialism** may include the work of international aid agencies who introduce modern technological agricultural methods and plant species from developed countries while overlooking indigenous varieties and agricultural approaches that are better suited to the particular region.

Ethnocentrism can be so strong that when confronted with all the differences of a new culture, one may experience disorientation and frustration. In sociology, we call this **culture shock**. A traveller from Toronto might find the nightly silence of rural Alberta unsettling, not peaceful. An exchange student from China might be annoyed by the constant interruptions in class as other students ask questions — a practice that is considered rude in China. Perhaps the Toronto traveller was initially captivated with Alberta's quiet beauty, and the Chinese student was originally excited to see an Canadian-style classroom firsthand. But as they experience unanticipated differences from their own culture, their excitement gives way to discomfort and doubts about how to behave appropriately in the new situation. Eventually, as people learn more about a culture, they recover from culture shock.

Culture shock may appear because people are not always expecting cultural differences. Anthropologist Ken Barger discovered this when conducting participatory observation in an Inuit community in the Canadian Arctic (1971). Originally from Indiana, Barger hesitated when invited to join a local snowshoe race. He knew he'd never hold his own against these experts. Sure enough, he finished last, to his mortification. But the tribal members congratulated him, saying, "You really tried!" In Barger's own culture, he had learned to value victory. To the Inuit people winning was enjoyable, but their culture valued survival skills essential to their environment: How hard someone tried could mean the difference between life and death. Over the course of his stay, Barger participated in caribou hunts, learned how to take shelter in winter storms, and sometimes went days with little or no food to share among tribal members. Trying hard and working together, two nonmaterial values, were indeed much more important than winning.

During his time with the Inuit, Barger learned to engage in cultural relativism. **Cultural relativism** is the practice of assessing a culture by its own standards rather than viewing it through the lens of one's own culture. The anthropologist Ruth Benedict (1887–1948) argued that each culture has an internally consistent pattern of thought and action, which alone could be the basis for judging the merits and morality of the culture's practices. Cultural relativism requires an open mind and a willingness to consider, and even adapt to, new values and norms. The logic of cultural relativism is at the basis of contemporary policies of multiculturalism. However, indiscriminately embracing everything about a new culture is not always possible. Even the most culturally relativist people from egalitarian societies, such as Canada — societies in which women have political rights and control over their own bodies — would question whether the widespread practice of female genital circumcision in countries such as Ethiopia and Sudan should be accepted as a part of a cultural tradition.



Figure 3.14. American anthropologist Ruth Benedict: "The purpose of anthropology is to make the world safe for human differences." (Photo courtesy of Ruth Benedict/Wikimedia Commons)

Sociologists attempting to engage in cultural relativism may struggle to reconcile aspects of their own culture with aspects of a culture they are studying. Pride in one's own culture does not have to lead to imposing its values on others. Nor does an appreciation for another culture preclude individuals from studying it with a critical eye. In the case of female genital circumcision, a *universal* right to life and liberty of the person conflicts with the neutral stance of cultural relativism. It is not necessarily ethnocentric to be critical of practices that violate universal standards of human dignity that are contained in the cultural codes of all cultures, (while not necessarily followed in practice). Not every practice can be regarded as culturally relative. Cultural traditions are not immune from power imbalances and liberation movements that seek to correct them.

Feminist sociology is particularly attuned to the way that most cultures present a male-dominated view of the world as if it were simply *the* view of the world. **Androcentricism** is a perspective in which male concerns, male attitudes, and male practices are presented as "normal" or define what is significant and valued in a culture. Women's experiences, activities, and contributions to society and history are ignored, devalued, or marginalized.

> As a result the perspectives, concerns, and interests of only one sex and class are represented as general. Only one sex and class are directly and actively involved in producing, debating, and developing its ideas, in creating its art, in forming its medical and psychological conceptions, in framing its laws, its political principles, its educational values and objectives. Thus a one-sided standpoint comes to be seen as natural, obvious, and general, and a one-sided set of interests preoccupy intellectual and creative work. (Smith, 1987)

In part this is simply a question of the bias of those who have the power to define cultural values, and in part it is the result of a process in which women have been actively excluded from the culture-creating process. It is still common, for example, to read writing that uses the personal pronoun "he" or the word "man" to represent people in general or humanity. The overall effect is to establish masculine values and imagery as normal. A "policeman" brings to mind a man who is doing a "man's job", when in fact women have been involved in policing for several decades now.

Making Connections: Social Policy and Debate

Multiculturalism in Canada



Figure 3.15. Multiculturalism tree planted in Stanley Park to bring B.C.'s 2012 Multiculturalism Week to a close. The gesture of planting the tree is meant to "symbolize the deep roots and flourishing growth of B.C.'s diverse communities." Is multiculturalism just a gesture or is it a meaningful attempt to recognize and support Canadian diversity? (Image courtesy of the Province of British Columbia/Flickr

One prominent aspect of contemporary Canadian cultural identity is the idea of **multiculturalism**. Canada was the first officially declared multicultural society in which, as Prime Minister Pierre Trudeau declared in 1971, no culture would take precedence over any other. Multiculturalism refers to both the fact of the existence of a diversity of cultures within one territory and to a way of conceptualizing and managing cultural diversity. As a policy, multiculturalism seeks to both promote and recognize cultural differences while addressing the inevitability of cultural tensions. In the 1988 Multiculturalism Act, the federal government officially acknowledged its role "in bringing about equal access and participation for all Canadians in the economic, social, cultural, and political life of the nation" (Government of Canada, as cited in Angelini & Broderick, 2012).

However, the focus on multiculturalism and culture *per se* has not always been so central to Canadian public discourse. Multiculturalism represents a relatively recent cultural development. Prior to the end of World War II, Canadian authorities used the concept of biological race to differentiate the various types of immigrants and Aboriginal peoples in Canada. This focus on biology led to corresponding fears about the quality of immigrant "stock" and the problems of how to manage the mixture of races. In this context, three different models for how to manage diversity were in contention: (1) the American "melting pot" paradigm in which the mingling of races was thought to be able to produce a super race with the best qualities of all races intermingled, (2) strict exclusion or deportation of races seen to be "unsuited" to Canadian social and environmental conditions, or (3) the Canadian "mosaic" that advocated for the separation and compartmentalization of races (Day, 2000).

After World War II, the category of race was replaced by culture and ethnicity in the public discourse, but the mosaic model was retained. Culture came to be understood in terms of the new anthropological definitions of culture as a deep-seated emotional-psychological phenomenon. In this conceptualization, to be deprived of culture through coercive assimilation would be a type of cultural genocide. As a result, alternatives to cultural assimilation into the dominant Anglo-Saxon culture were debated, and the Canadian mosaic model for managing a diverse population was redefined as multiculturalism. Based on a new appreciation of culture, and with increased immigration from non-European countries, Canadian identity was re-imagined in the 1960s and 1970s as a happy cohabitation of cultures, each of which was encouraged to maintain their cultural distinctiveness. So while the cultural identity of Canadians is diverse, the cultural paradigm in which their coexistence is conceptualized — multiculturalism — has come to be equated with Canadian cultural identity.

However, these developments have not alleviated the problems of cultural difference with which sociologists are concerned. Multicultural policy has sparked numerous, remarkably contentious issues ranging from whether Sikh RCMP officers can wear turbans to whether Mormon sects can have legal polygamous marriages. In 2014, the Parti Québécois in Quebec proposed a controversial Charter of Quebec Values that would, to reinforce the neutrality of the state, ban public employees from wearing "overt and conspicuous" religious symbols and headgear. This position represented a unique Quebec-based concept of multiculturalism known as **interculturalism**. Whereas multiculturalism begins with the premise that there is no dominant culture in Canada, interculturalism begins with the premise that in Quebec francophone culture is dominant but also precarious in the North American context. It cannot risk further fragmentation. Therefore the intercultural model of managing diversity is to recognize and respect the diversity of immigrants who seek to integrate into Quebec society but also to make clear to immigrants that they must recognize and respect Quebec's common or "fundamental" values.

Critics of multiculturalism identify four related problems:

- Multiculturalism only superficially accepts the equality of all cultures while continuing to limit and prohibit actual equality, participation, and cultural expression. One key element of this criticism is that there are only two official languages in Canada — English and French — which limits the full participation of non-anglophone/francophone groups.
- Multiculturalism obliges minority individuals to assume the limited cultural identities of their ethnic group of origin, which leads to stereotyping minority groups, ghettoization, and feeling isolated from the national culture.
- Multiculturalism causes fragmentation and disunity in Canadian society. Minorities do not integrate into existing Canadian society but demand that Canadians adopt or accommodate their way of life, even when they espouse controversial values, laws, and customs (like polygamy or sharia law).
- Multiculturalism is based on recognizing group rights which undermines constitutional protections of individual rights.

On the other hand, proponents of multiculturalism like Will Kymlicka describe the Canadian experience with multiculturalism as a success story. Kymlicka argues that the evidence shows:

> "Immigrants in Canada are more likely to become citizens, to vote and to run for office, and to be elected to office than immigrants in other Western democracies, in part because voters in Canada do not discriminate against such candidates. Compared to their counterparts in other Western democracies, the children of immigrants have better educational outcomes, and while immigrants in all Western societies suffer from an "ethnic penalty" in translating their skills into jobs, the size of this ethnic penalty is lowest in Canada. Compared to residents of other Western democracies, Canadians are more likely to say that immigration is beneficial and less likely to have prejudiced views of Muslims. And whereas ethnic diversity has been shown to erode levels of trust and social capital in other countries, there appears to be a "Canadian exceptionalism" in this regard."(2012)

3.2. Elements of Culture

Values and Beliefs

The first two elements of culture we will discuss, and perhaps the most crucial, are values and beliefs. **Values** are a culture's standard for discerning desirable states in society (what is true, good, just, or beautiful). Values are deeply embedded and critical for transmitting and teaching a culture's beliefs. **Beliefs** are the tenets or convictions that people hold to be true. Individuals in a society have specific beliefs, but they also share collective values. To illustrate the difference, North Americans commonly believe that anyone who works hard enough will be successful and wealthy. Underlying this belief is the value that wealth is good and desirable.

Values help shape a society by suggesting what is good and bad, beautiful and ugly, and what should be sought or avoided. Consider the value that North American culture places upon youth. Children represent innocence and purity, while a youthful adult appearance signifies sexuality. Shaped by this value, North Americans spend millions of dollars each year on cosmetic products and surgeries to look young and beautiful.

Sometimes the values of Canada and the United States are contrasted. Americans are said to have an individualistic

culture, meaning people place a high value on individuality and independence. In contrast, Canadian culture is said to be more collectivist, meaning the welfare of the group and group relationships are primary values. As we will see below, Seymour Martin Lipset used these contrasts of values to explain why the two societies, which have common roots as British colonies, developed such different political institutions and cultures (Lipset, 1990).

Living up to a culture's values can be difficult. It's easy to value good health, but it's hard to quit smoking. Marital monogamy is valued, but many spouses engage in infidelity. Cultural diversity and equal opportunities for all people are valued in Canada, yet the country's highest political offices have been dominated by white men.

Values often suggest how people should behave, but they do not accurately reflect how people do behave. As we saw in Chapter 2, the classical sociologist Harriet Martineau made a basic distinction between what people say they believe and what they actually do, which are often at odds. Values portray an **ideal culture**, the standards society would like to embrace and live up to. But ideal culture differs from **real culture**, the way society actually is, based on what occurs and exists. In an ideal culture, there would be no traffic accidents, murders, poverty, or racial tension. But in real culture, police officers, lawmakers, educators, and social workers constantly strive to prevent or repair those accidents, crimes, and injustices. Teenagers are encouraged to value celibacy. However, the number of unplanned pregnancies among teens reveals that not only is the ideal hard to live up to, but that the value alone is not enough to spare teenagers from the potential consequences of having sex.

One way societies strive to put values into action is through rewards, sanctions, and punishments. When people observe the norms of society and uphold its values, they are often rewarded. A boy who helps an elderly woman board a bus may receive a smile and a "thank you." A business manager who raises profit margins may receive a quarterly bonus. People sanction certain behaviours by giving their support, approval, or permission, or by instilling formal actions of disapproval and non-support. **Sanctions** are a form of **social control**, a way to encourage conformity to cultural norms. Sometimes people conform to norms in anticipation or expectation of positive sanctions: Good grades, for instance, may mean praise from parents and teachers.

When people go against a society's values, they are punished. A boy who shoves an elderly woman aside to board the bus first may receive frowns or even a scolding from other passengers. A business manager who drives away customers will likely be fired. Breaking norms and rejecting values can lead to cultural sanctions such as earning a negative label — lazy, no-good bum — or to legal sanctions such as traffic tickets, fines, or imprisonment.

Values are not static; they vary across time and between groups as people evaluate, debate, and change collective societal beliefs. Values also vary from culture to culture. For example, cultures differ in their values about what kinds of physical closeness are appropriate in public. It is rare to see two male friends or coworkers holding hands in Canada where that behaviour often symbolizes romantic feelings. But in many nations, masculine physical intimacy is considered natural in public. A simple gesture, such as hand-holding, carries great symbolic differences across cultures.



Figure 3.16. In many parts of Africa and the Middle East, it is considered normal for men to hold hands in friendship. How would Canadians react to these two soldiers? (Photo courtesy of Geordie Mott/Wikimedia Commons)

Norms

So far, the examples in this chapter have often described how people are expected to behave in certain situations — for example, when buying food or boarding a bus. These examples describe the visible and invisible rules of conduct through which societies are structured, or what sociologists call **norms**. As opposed to values and beliefs which identify desirable states and convictions about how things are, a norm is a generally accepted way of doing things. Norms define how to behave in accordance with what a society has defined as good, right, and important, and most members of the society adhere to them because their violation invokes some degree of sanction. They define the rules that govern behaviour.

Formal norms are established, written rules. They are behaviours worked out and agreed upon in order to suit and serve most people. Laws are formal norms, but so are employee manuals, college entrance exam requirements, and no running at swimming pools. Formal norms are the most specific and clearly stated of the various types of norms, and the most strictly enforced. But even formal norms are enforced to varying degrees, reflected in cultural values.

For example, money is highly valued in North America, so monetary crimes are punished. It is against the law to rob a bank, and banks go to great lengths to prevent such crimes. People safeguard valuable possessions and install anti-theft devices to protect homes and cars. Until recently, a less strictly enforced social norm was driving while intoxicated. While it is against the law to drive drunk, drinking is for the most part an acceptable social behaviour. Though there have been laws in Canada to punish drunk driving since 1921, there were few systems in place to prevent the crime until quite recently. These examples show a range of enforcement in formal norms.

There are plenty of formal norms, but the list of **informal norms** — casual behaviours that are generally and widely conformed to — is longer. People learn informal norms by observation, imitation, and general socialization. Some informal norms are taught directly — "kiss your Aunt Edna" or "use your napkin" — while others are learned by observation, including observations of the consequences when someone else violates a norm. Children learn quickly that picking your nose is subject to ridicule when they see someone shamed for it by other children. Although informal norms define personal interactions, they extend into other systems as well. Think back to the discussion of fast food restaurants at the beginning of this chapter. In Canada, there are informal norms regarding behaviour at these restaurants. Customers line up to order their food, and leave when they are done. They do not sit down at a table with strangers, sing loudly as they prepare their condiments, or nap in a booth. Most people do not commit even benign breaches of informal norms. Informal norms dictate appropriate behaviours without the need of written rules.

Making Connections: Sociological Research

Breaching Experiments

Sociologist Harold Garfinkel (1917–2011) studied people's customs in order to find out how tacit and often unconscious societal rules and norms not only influenced behaviour but enabled the social order to exist (Weber, 2011). Like the symbolic interactionists, he believed that members of society together create a social order. He noted, however, that people often draw on inferred knowledge and unspoken agreements to do so. His resulting book, *Studies in Ethnomethodology* (1967), discusses the underlying assumptions that people use to create "accounts" or stories that enable them to make sense of the world.

One of his research methods was known as a breaching experiment. His breaching experiments tested sociological concepts of social norms and conformity. In a breaching experiment, the researcher purposely breaks a social norm or behaves in a socially awkward manner. The participants are not aware an experiment is in progress. If the breach is successful, however, these innocent bystanders will respond in some way. For example, he had his students go into local shops and begin to barter with the sales clerks for fixed price goods. "This says $14.99, but I'll give you $10 for it." Often the clerks were shocked or flustered. This breach reveals the unspoken convention in North America that the amount given on the price tag is the price. It also breaks a number of other conventions which seek to make commercial transactions as efficient and impersonal as possible. In another example, he had his students respond to the casual greeting, "How are you?" with a detailed and elaborate description of their state of health and well-being. The point of the experiments was not that the experimenter would simply act obnoxiously or weird in public. Rather, the



Figure 3.17. Harold Garfinkel, founder of ethnomethodology in sociology (Image courtesy of Arlene Garfinkel/Wikimedia Commons).

point is to deviate from a specific social norm in a small way, to subtly break some form of social etiquette, and see what happens.

To conduct his ethnomethodology, Garfinkel deliberately imposed strange behaviours on unknowing people. Then he would observe their responses. He suspected that odd behaviours would shatter conventional expectations, but he was not sure how. He set up, for example, a simple game of tic-tac-toe. One player was asked beforehand not to mark Xs and Os in the boxes but on the lines dividing the spaces instead. The other player, in the dark about the study, was flabbergasted and did not know how to continue. The reactions of outrage, anger, puzzlement, or other emotions illustrated the deep level at which unspoken social norms constitute social life.

There are many rules about speaking with strangers in public. It is okay to tell a woman you like her shoes. It is not okay to ask if you can try them on. It is okay to stand in line behind someone at the ATM. It is not okay to look over their shoulder as they make the transaction. It is okay to sit beside someone on a crowded bus. It is weird to sit beside a stranger in a half-empty bus.

For some breaches, the researcher directly engages with innocent bystanders. An experimenter might strike up a conversation in a public bathroom, where it's common to respect each other's privacy so fiercely as to ignore other people's presence. In a grocery store, an experimenter might take a food item out of another person's grocery cart, saying, "That looks good! I think I'll try it." An experimenter might sit down at a table with others in a fast food restaurant, or follow someone around a museum, studying the same paintings. In those cases, the bystanders are pressured to respond, and their discomfort illustrates how much we depend on social norms. These cultural norms play an important role. They let us know how to behave around each other and how to feel comfortable in our community, but they are not necessarily rational. Why should we not talk to someone in a public bathroom, or haggle over the price of a good in a store? Breaching experiments uncover and explore the many unwritten social rules we live by. They indicate the degree to which the world we live in is fragile, arbitrary and ritualistic; socially structured by deep, silent, tacit agreements with others of which we are frequently only dimly aware.

Folkways, Mores, and Taboos

Norms may be further classified as mores, folkways, or taboos. **Mores** (pronounced *mor–ays*) are norms that embody the moral views and principles of a group. They are based on social requirements. Violating them can have serious consequences. The strongest mores are legally protected with laws or other formal norms. In Canada, for instance, murder is considered immoral, and it is punishable by law (a formal norm). More often, mores are judged and guarded by public sentiment (an informal norm). People who violate mores are seen as shameful. They can even be shunned or banned from some groups. The mores of the Canadian school system require that a student's writing be in the student's own words

or else the student should use special stylistic forms such as quotation marks and a system of citation, like MLA (Modern Language Association) style, for crediting the words to other writers. Writing another person's words as if they are one's own has a name: plagiarism. The consequences for violating this norm are severe, and can even result in expulsion.

Unlike mores, **folkways** are norms without any moral underpinnings. They are based on social preferences. Folkways direct appropriate behaviour in the day-to-day practices and expressions of a culture. Folkways indicate whether to shake hands or kiss on the cheek when greeting another person. They specify whether to wear a tie and a blazer or a T-shirt and sandals to an event. In Canada, women can smile and say hello to men on the street. In Egypt, it is not acceptable. In northern Europe, it is fine for people to go into a sauna or hot tub naked. Often in North America, it is not. An opinion poll that asked Canadian women what they felt would end a relationship after a first date showed that women in British Columbia were pickier than women in the rest of the country (*Times Colonist*, 2014). First date deal breakers included poor hygiene (82 percent), being distracted by a mobile device (74 percent), talking about sexual history and being rude to waiters (72 percent), and eating with one's mouth open (60 percent). All of these examples illustrate breaking informal rules, which are not serious enough to be called mores, but are serious enough to terminate a relationship before it has begun. Folkways might be small manners, but they are by no means trivial.

Taboos refer to actions which are strongly forbidden by deeply held sacred or moral beliefs. They are the strongest and most deeply held norms. Their transgression evokes revulsion and severe punishment. In its original use taboo referred to being "consecrated, inviolable, forbidden, unclean, or cursed" (Cook & King, 1784). There was a clear supernatural context for the prohibition; the act offended the gods or ancestors, and evoked their retribution. In secular contexts, taboos refer to powerful moral prohibitions that protect what are regarded as inviolable bonds between people. Incest, pedophilia, and patricide or matricide are taboos.

Many mores, folkways, and taboos are taken for granted in everyday life. People need to act without thinking to get seamlessly through daily routines; we can not stop and analyze every action (Sumner, 1906). The different levels of norm enable the "ongoing concerting and coordinating of individuals' activities" as Dorothy Smith put it (1999). These different levels of norm help people negotiate their daily life within a given culture and as such their study is crucial for understanding the distinctions between different cultures.

Symbols and Language



Figure 3.18. Some road signs are universal. But how would you interpret sign (b)? (Photo (a) courtesy of Andrew Bain/Flickr; photo (b) courtesy of HonzaSoukup/Flickr)

Humans, consciously and subconsciously, are always striving to make sense of their surrounding world. **Symbols —** such as gestures, signs, objects, signals, and words — are tangible marks that stand in for or represent something else. Symbols provide clues to understanding the underlying experiences, statuses, states, and ideas they express. They convey recognizable meanings that are shared by societies. In the words of George Herbert Mead:

> Our symbols are universal. You cannot say anything that is absolutely particular, anything you say that has any meaning at all is universal. (*Mind, Self and Society,* 1934)

The world is filled with symbols. Sports uniforms, company logos, and traffic signs are symbols. In some cultures, a gold ring is a symbol of marriage. Some symbols are highly functional; stop signs, for instance, provide useful instruction. As physical objects they belong to material culture, but because they function as symbols, they also convey nonmaterial cultural meanings. Some symbols are only valuable in what they represent. Trophies, blue ribbons, or gold medals, for example, serve no purpose other than to represent accomplishments. Many objects have both material and nonmaterial symbolic value.

A police officer's badge and uniform are symbols of authority and law enforcement. The sight of a police officer in uniform or in a police car triggers reassurance in some citizens but annoyance, fear, or anger in others.

It's easy to take symbols for granted. Few people challenge or even think about the signs on the doors of public restrooms, but the figures on the signs are more than just symbols that tell men and women which restroom to use. They also uphold the value, in North America, that public restrooms should be gender exclusive. Even though stalls are relatively private, it is still somewhat uncommon to encounter unisex bathrooms.



Figure 3.19. An exercise in detournement in Barcelona transforms the symbol for "do not enter" into a hand holding a brick, a symbol for insurrection (Image courtesy of acb/ Flickr).

Symbols often get noticed when they are used out of context. Used unconventionally, symbols convey strong messages. A stop sign on the door of a corporation makes a political statement, as does a camouflage military jacket worn in an antiwar protest. Together, the semaphore signals for "N" and "D" represent nuclear disarmament and form the well-known peace sign (Westcott, 2008). Internet memes — images that spread from person to person through reposting — often adopt the tactics of **detournement** or misappropriation used by the French Situationists of the 1950s and 1960s. The Situationists sought to subvert media and political messages by altering them slightly — "detouring" or hijacking them — in order to defamiliarize familiar messages, signs, and symbols. An ordinary image of a cat combined with the grammatically-

challenged caption "I Can Has Cheezburger?" spawned the internet phenomenon lolcats because of the funny, nonsensical nature of its non sequitur message. An image of former Prime Minister Stephen Harper in a folksy sweater holding a cute cat was altered to show him holding an oily duck instead; this is a detournement with a political message.

Even the destruction of symbols is symbolic. Effigies representing public figures are beaten to demonstrate anger at certain leaders. In 1989, crowds tore down the Berlin Wall, a decades-old symbol of the division between East and West Germany, or between communism and capitalism.

While different cultures have varying systems of symbols, there is one that is common to all: the use of language. **Language** is a symbolic system through which people communicate and through which culture is transmitted. Some languages contain a system of symbols used for written communication, while others rely only on spoken communication and nonverbal actions.

Societies often share a single language, and many languages contain the same basic elements. An alphabet is a written system made of symbolic shapes that refer to spoken sounds. Taken together, these symbols convey specific meanings. The English alphabet uses a combination of 26 letters to create words; these 26 letters make up over 600,000 recognized English words (*Oxford English Dictionary,* 2011).

Rules for speaking and writing vary even within cultures, most notably by region. Do you refer to a can of carbonated liquid as a soda, pop, or soft drink? Is a household entertainment room a family room, rec room, or den? When leaving a restaurant, do you ask your server for the cheque, the ticket, l'addition, or the bill?

Language is constantly evolving as societies create new ideas. In this age of technology, people have adapted almost instantly to new nouns such as email and internet, and verbs such as download, text, and blog. Twenty years ago, the general public would have considered these nonsense words.

Even while it constantly evolves, language continues to shape our reality. This insight was established in the 1920s by two linguists, Edward Sapir and Benjamin Whorf. They believed that reality is culturally determined, and that any interpretation of reality is based on a society's language. To prove this point, the sociologists argued that every language has words or expressions specific to that language. In Canada, for example, the number 13 is associated with bad luck. In Japan, however, the number four is considered unlucky, since it is pronounced similarly to the Japanese word for death.

The **Sapir-Whorf hypothesis** is based on the idea that people experience their world through their language and that they, therefore, understand the world through the culture embedded in their language. The hypothesis, which has also been called linguistic relativity, states that we initially develop language to express concepts that emerge from our experience of the world, but afterwards language comes back to shape our experience of the world (Swoyer, 2003). Studies have shown, for instance, that unless people have access to the word "ambivalent," they do not recognize an experience of uncertainty due to conflicting positive and negative feelings about one issue. If a person cannot describe the experience, the person cannot have the experience.

Similarly, in Wade Davis' (2007) discussion about the ethnosphere — the sum total of "ways of thinking, ways of being, and ways of orienting oneself on the earth" — that we began the chapter with, each language is understood to be more than just a set of symbols and linguistic rules. Each language is an archive of a culture's unique cosmology, wisdom, ecological knowledge, rituals, beliefs and norms. Each contributes its unique solution to the question of what it means to be human to the ethnosphere. The compilers of *Ethnologue* estimate that currently 7,105 languages are used in the world (Lewis et al., 2013). This would suggest that there are at least 7,105 distinct cultural contexts through which humans interpret and experience the world. The Sapir-Whorf hypothesis would suggest that their worlds differ to the degree that their languages differ. However Davis notes that today half of the world's languages are no longer being passed down to children. When languages die out or fail to be passed on to subsequent generations, whole ways of knowing and being in the world die out with them and the ethnosphere is diminished.

Making Connections: Sociology in the Real World

Is Canada Bilingual?

In the 1960s it became clear that the federal government needed to develop a bilingual language policy to integrate



Figure 3.20. Starbucks on Rue University, Montreal (Image courtesy of 12th St David/Flickr)

French Canadians into the national identity and prevent their further alienation. The Royal Commission on Bilingualism and Biculturalism (1965) recommended establishing official bilingualism within the federal government. As a result, the Official Languages Act became law in 1969 and established both English and French as the official languages of the federal government and federal institutions such as the courts. Pierre Elliott Trudeau's governments of the late 1960s and early 1970s had an even broader ambition: to make Canada itself bilingual. Not only would Canadians be able to access government services in either French or English, no matter where they were in the country, but also receive French or English education. The entire country would be home for both French or English speakers (McRoberts, 1997).

However, in the 1971 census 67 percent of Canadians spoke English most often at home, while only 26 percent spoke French at home and most of these were in Quebec. Approximately 13 percent of Canadians could maintain a conversation in both languages (Statistics Canada, 2007). Outside Quebec, the province with the highest proportion of people who spoke French at home was New Brunswick at 31.4 percent. The next highest were Ontario at 4.6 percent and Manitoba at 4 percent. In British Columbia, only 0.5 percent of the population spoke French at home. French speakers had widely settled Canada, but French speaking outside Quebec had lost ground since Confederation because of the higher rates of anglophone immigrants, the assimilation of francophones, and the lack of French-speaking institutions outside Quebec (McRoberts, 1997). It seemed even in 1971 that the ideal of creating a bilingual nation was unlikely and unrealistic.

What has happened to the concept of bilingualism over the last 40 years? According to the 2011 census, 58 percent of the Canadian population spoke English at home, while only 18.2 percent spoke French at home. Proportionately the number of both English and French speakers has actually decreased since the introduction of the Official Languages Act in 1969. On the other hand, the number of people who can maintain a conversation in both official languages has increased to 17.5 percent from 13 percent (Statistics Canada, 2007). However, the most significant linguistic change in Canada has not been French-English bilingualism, but the growth in the use of languages other than French and English. In a sense, what has happened is that the shifting cultural composition of Canada has rendered the goal of a bilingual nation anachronistic.

Today it would be more accurate to speak of Canada as a multilingual nation. One-fifth of Canadians speak a language other than French or English at home; 11.5 percent report speaking English and a language other than French, and 1.3 percent report speaking French and a language other than English. In Toronto, 32.2 percent of the population speak a language other than French and English at home: 8.8 percent speak Cantonese, 8 percent speak Punjabi, 7 percent speak an unspecified dialect of Chinese, 5.9 percent speak Urdu, and 5.7 percent speak Tamil. In Greater Vancouver, 31 percent of the population speak a language other than French and English at home: 17.7 percent

of whom speak Punjabi, followed by 16.0 percent who speak Cantonese, 12.2 percent who speak an unspecified dialect of Chinese, 11.8 percent who speak Mandarin, and 6.7 percent who speak Philippine Tagalog.

Today, the government of Canada still conducts business in both official languages. French and English are the dominant languages in the workplace and schools. Labels on products are required to be in both French and English. But increasingly a lot of product information is also made available in multiple languages. In Vancouver and Toronto, and to a lesser extent Montreal, linguistic diversity has become increasingly prevalent. French and English are still the central languages of convergence and integration for immigrant communities who speak other languages — only 1.8 percent of the population were unable to conduct a conversation in either English or French in 2011 — but increasingly Canada is linguistically diverse rather than bilingual in the two official languages.



Figure 3.21. Nowadays, many signs—on streets and in stores—are multilingual. What effect does this have on members of society? What effect does it have on our culture? (Photo courtesy of Michael Gil/Flickr)

Material and Nonmaterial Culture

Even an action as seemingly simple as commuting to work evidences a great deal of cultural propriety. Take the case of going to work on public transportation. Whether commuting in Dublin, Cairo, Mumbai, or Vancouver, many behaviours will be the same in all locations, but significant differences also arise between cultures. Typically in Canada, a passenger finds a marked bus stop or station, waits for the bus or train, pays an agent before or after boarding, and quietly takes a seat if one is available. But when boarding a bus in Cairo, passengers might have to run, because buses there often do not come to a full stop to take on patrons. Dublin bus riders are expected to extend an arm to indicate that they want the bus to stop for them. When boarding a commuter train in Mumbai, passengers must squeeze into overstuffed cars amid a lot of pushing and shoving on the crowded platforms. That kind of behaviour would be considered the height of rudeness in Canada, but in Mumbai it reflects the daily challenges of getting around on a train system that is taxed to capacity.

In this example of commuting, the different cultural responses are seen as various solutions to a common problem, the problem of public transportation. The problem is shared, but the solutions are different. Cultural solutions consist of two components: thoughts or perceptual orientations (expectations about personal space, for example) and tangible things (bus stops, trains, and seating capacity). Culture includes both material and non-material elements. **Material culture** refers to the artifacts, technologies, and products of a group of people. Metro passes and bus tokens are part of material culture, as are automobiles, stores, and the physical structures where people worship. **Nonmaterial culture**, in contrast, consists of the knowledge and beliefs, forms of communication, and norms of behaviour of a society. Both material and nonmaterial

components of culture are variables within the cultural "package" social groups use to adapt themselves or respond to the tasks of life.

It is important to point out here that material and nonmaterial aspects of culture are linked, and physical objects often symbolize cultural ideas. A bus or transit pass is a material object, but it represents a form of nonmaterial culture, namely, capitalism, and the acceptance of paying for transportation. Clothing, hairstyles, and jewellery are part of material culture, but the appropriateness of wearing certain clothing for specific events reflects nonmaterial culture. A school building belongs to material culture, but the teaching methods and educational standards are part of education's nonmaterial culture. These material and nonmaterial aspects of culture can vary subtly from region to region. As people travel farther afield, moving from different regions to entirely different parts of the world, certain material and nonmaterial aspects of culture become dramatically unfamiliar. We notice this when we encounter different cultures. As we interact with cultures other than our own, we become more aware of the differences and commonalities between others' worlds and our own.

3.3. Culture as Innovation: Pop Culture, Subculture, Global Culture



Figure 3.22. Pop culture heroes from the early days of pulp fiction. The term "pulp" refers to the cheap and disposable wood-pulp paper the books and magazines were published on (Image courtesy of Terry McCombs/Flickr)

In the introduction of this chapter we noted that culture is the source of the shared meanings through which we interpret and orient ourselves to the world. While cultural practices are in some respects always a response to biological givens or to the structure of the socioeconomic formation, they are not determined by these factors. Culture is innovative; it expresses the human imagination in its capacity to go beyond what is given, to solve problems, to produce **innovations** — new objects, ideas, or ways of being introduced to culture for the first time. At the same time, we are born into cultures that pre-exist us and shape us: Languages, ways of thinking, ways of doing things, and artifacts we do not invent but inherit; they are ready made forms of life that we fit ourselves into. Culture can, therefore, also be restrictive, imposing forms of life, beliefs, and practices on people, and limiting the possibilities of what we can think and do. As Marx said, "the tradition of all dead generations weighs like a nightmare on the brains of the living" (1852).

In the next two sections of this chapter we will examine aspects of culture which are innovative–high culture and popular culture, subculture, and global culture — and aspects of culture which are restrictive — rationalization and consumerism.

High Culture and Popular Culture

Do you prefer listening to opera or hip hop music? Do you like watching horse jumping or NASCAR? Do you read books of poetry or magazines about celebrities? In each pair, one type of entertainment is considered high brow and the other low brow. Sociologists use the term **high culture** to describe a form of cultural experience characterized by formal complexity, eternal values, or intrinsic authenticity such as is provided by the Greek classics, Beethoven's symphonies, Sergei Diaghilev's ballets, or James Joyce's *Ulysses*. People often associate high culture with intellectualism, aesthetic taste, elitism, wealth, and prestige. Pierre Bourdieu (1984) argues high culture is not only a symbol of distinction, but a

means of maintaining status and power distinctions through the transfer of **cultural capital**: the knowledge, skills, tastes, mannerisms, speaking style, posture, material possessions, credentials, etc. that a person acquires from his or her family background. Events considered high culture can be expensive and formal — attending a ballet, seeing a play, or listening to a live symphony performance — and the people who are in a position to appreciate these events, despite the difficulty, are often those who have enjoyed the benefits of an enriched and exclusive cultural background.

The term **popular culture** refers to the pattern of cultural experiences and attitudes that exist in mainstream society: cultural experiences well liked by "the people." Popular culture events might include a parade, a baseball game, or a rock concert. Rock and pop music — "pop" is short for "popular" — are part of popular culture. In modern times, popular culture is often expressed and spread via commercial media such as radio, television, movies, the music industry, publishers, and corporate-run websites. Unlike high culture, popular culture is known and accessible to most people. You can share a discussion of favourite hockey teams with a new coworker, or comment on the TV show *House of Cards* when making small talk in the check-out line at the grocery store. But if you tried to launch into a deep discussion on the classical Greek play *Antigone*, few members of Canadian society today would be familiar with it.

Although high culture may be viewed as superior to popular culture, the labels of high culture and popular culture vary over time and place. Shakespearean plays, considered pop culture when they were written, are now among our society's high culture. In the current "Second Golden Age of Television" (2000s to the present, the first Golden Age was in the 1950s and 1960s), television programming has gone from typical low brow situation comedies, soap operas, and crime dramas to the development of "high-quality" series with increasingly sophisticated characters, narratives, and themes (e.g., *The Sopranos*, *True Blood*, *Dexter*, *Breaking Bad*, *Mad Men,* and *Game of Thrones*).



Figure 3.23. Celebration Town Hall in the Walt Disney town of Celebration, Florida is an example of postmodern architecture that playfully borrows and blends elements from historical styles (Greek stoa left, grain silo right) instead of inventing new styles in the modern tradition. The Town Hall is also, perhaps unintentionally, ironic because the town has no mayor or local municipal government. Disney Corporation directly administers the town, which is modelled on Walt Disney World resort's nostalgic image of small-town America. (Image courtesy of trevor.patt/Flickr)

Contemporary popular culture is frequently referred to as a postmodern culture. In the era of modern culture, or modernity, the distinction between high culture and popular culture framed the experience of culture in more or less a clear way. The high culture of 19th– and 20th-century modernity was often experimental and avant-garde, seeking new and original forms in literature, art, and music to express the elusive, transient, underlying experiences of the modern human condition. The other side of high culture was the tradition of conserving and passing down the highest and most refined expressions of human cultural possibility: the eternal values and noble sensibilities contained in the "great works" of culture. High culture also had a civilizing mission to preserve and pass down. In both forms, high culture appealed to a limited but sophisticated audience. Popular culture, on the other hand, was simply the culture of the people; it was immediately accessible and easily digestible, either in the form of folk traditions or commercialized mass culture.

In **postmodern culture —** the form of culture that came after modern culture — this distinction begins to break down, and it becomes more common to find various sorts of mash-ups of high and low: Serious literature combined with zombie themes; pop music constructed from recycled samples of original hooks and melodies; symphony orchestras performing the soundtracks of cartoons; architecture that playfully borrows and blends historical styles; etc. Rock music is the subject

of many high brow histories and academic analyses, just as the common objects of popular culture are transformed and represented as high art (e.g., Andy Warhol's *Campbell's Soup Cans* or the classic film noir movies of the 1940s and 1950s). The dominant sensibility of postmodern popular culture is both playful and ironic, as if the blending and mixing of cultural references, like in the television show *The Simpsons*, is one big in-joke. Postmodern culture has been referred to as a "culture of quotations" (Jameson, 1985) in the sense that instead of searching for new, authentic forms as in avant-garde modernism, it recycles and remixes (i.e. quotes) elements of previous cultural production.

At a more serious level, postmodern culture is seen to challenge modern culture in a number of key ways. The postmodern eclectic mix of elements from different times and places challenges the modernist concepts of authentic expression and progress; the idea that cultural creations can and should seek new and innovative ways to express the deep meanings of life. The playfulness and irony of postmodern culture seem to undermine the core values of modernity, especially the idea that cultural critique or innovations in architecture, art, and literature, etc. have an important role in, not just entertaining people, but improving the quality of social life. In postmodernity, nothing is to be taken very seriously, even ourselves. Moreover, in postmodernity everyone with access to a computer and some editing software is seen to be a cultural producer; everyone has an important voice and access to knowledge is simply a matter of crowd-sourcing. The modernist myth of the great creator or genius is rejected in favour of a plurality of voices.

Jean Francois Lyotard (1984) defined postmodern culture as "incredulity towards metanarratives" meaning that postmoderns no longer really believe in the big (i.e., meta) stories and social projects of modernity. Postmoderns are skeptical of the claims that scientific knowledge leads to progress, that political change creates human emancipation, that *Truth* sets us free. Some argue that the outcome of this erosion of authority and decline in consensus around core values is a thorough relativism of values in which no standard exists to judge one thing more significant than another. Everyone will make up their own little stories, each as valid as the next, as we see when creationists seek to debunk the "myths" of evolutionary theory, for example. Others argue that the outcome leads to a necessary critique of the unexamined assumptions of power and authority in modern culture–the rhetoric of "family values" or "scientific progress" lampooned in *The Simpsons,* for example. Instead of the privileged truths of elites and authorities, postmodernity witnesses the emergence of a plurality of different voices that had been relegated to the margins. Culture moves away from homogeneous sameness to heterogeneous diversity.

Subculture and Counterculture

A **subculture** is just as it sounds—a smaller cultural group within a larger culture. People of a subculture are part of the larger culture, but also share a specific identity within a smaller group. Thousands of subcultures exist within Canada. Ethnic groups share the language, food, and customs of their heritage. Other subcultures are united by shared experiences. For example, biker culture revolves around a dedication to motorcycles. Some subcultures are formed by members who possess traits or preferences that differ from the majority of a society's population. Alcoholics Anonymous offers support to those suffering from alcoholism. The body modification community embraces aesthetic additions to the human body, such as tattoos, piercings, and certain forms of plastic surgery. But even as members of a subculture band together around a distinct identity, they still identify with and participate in the larger society.

Sociologists distinguish subcultures from **countercultures**, which are a type of subculture that explicitly reject the larger culture's norms and values. In contrast to subcultures, which operate relatively smoothly within the larger society, countercultures might actively defy larger society by developing their own set of rules and norms to live by, sometimes even creating communities that operate outside of greater society. The post-World War II period was characterized by a series of "spectacular" youth cultures — teddy boys, beatniks, mods, hippies, bikers, skinheads, rastas, punks, new wavers, ravers, hip-hoppers, and hipsters — who in various ways sought to reject the values of their parents' generation. The hippies, for example, were a subculture that became a counterculture, blending protest against the Vietnam War, technocracy and consumer culture with a back to the land movement, non-Western forms of spirituality, and the practice of voluntary simplicity. Counterculture, in this example, refers to the *cultural* forms of life taken by a political and social protest movement.

Cults, a word derived from *cultus* or the "care" owed to the observance of spiritual rituals, are also considered countercultural groups. They are usually informal, transient religious groups or movements that deviate from orthodox beliefs and often, but not always, involve an intense emotional commitment to the group and allegiance to a charismatic

leader. In pluralistic societies like Canada, they represent quasi-legitimate forms of social experimentation with alternate forms of religious practice, community, sexuality and gender relations, proselytizing, economic organization, healing and therapy. However, sometimes their challenge to conventional laws and norms is regarded as going too far by the dominant society. For example, the group Yearning for Zion (YFZ) in Eldorado, Texas existed outside the mainstream, and the limelight, until its leader was accused of statutory rape and underage marriage. The sect's formal norms clashed too severely to be tolerated by U.S. law, and in 2008 authorities raided the compound, removing more than 200 women and children from the property.



Figure 3.24. Skinhead style consisted of "cropped hair, braces, short, wide Levi jeans or functional Sta-Prest trousers, plain or button-down Ben Sherman shirts and highly polished Doctor Marten boots" (Hebdige, 1979). (Image courtesy of Paul Townsend/Flickr).

The degree to which countercultures reject the larger culture's norms and values is questionable, however. In the analysis of spectacular, British working class youth subcultures like the teddy boys, mods, and skinheads, Phil Cohen (1972) noted that the style and the focal concerns of the groups could be seen as a "compromise solution between two contradictory needs: the need to create and express autonomy and difference from parents…and the need to maintain parental identifications" (as cited in Hebdige, 1979). In the 1960s and 70s, for example, skinheads shaved their heads, listened to ska music from Jamaica, participated in racist chants at soccer games, and wore highly polished Doctor Marten boots in a manner that deliberately alienated their parents while expressing their own alienation as working class youth with few job prospects in deindustrialized England. At the same time, noted Cohen, their subcultural outfit was more or less a "caricature of the model worker" their parents aspired to and their attitude simply exaggerated the proletarian, puritanical, and chauvinist traits of their parents' generation. On one hand the invention of skinhead culture was an innovative cultural creation; on the other hand it just exaggerated the already existing contradictions of the skinheads' class situation and that of their parents.

Making Connections: Sociology in the Real World

The Evolution of North American Hipster Subculture

Skinny jeans, chunky glasses, ironic moustaches, retro-style single speed bicycles and T-shirts with vintage logos—the hipster is a recognizable figure in contemporary North American culture. Predominantly based in metropolitan areas, hipsters seek to define themselves by a rejection of mainstream norms and fashion styles. As a subculture, hipsters spurn many values and beliefs of North American society, tending to prefer a bohemian lifestyle over one defined by the accumulation of power and wealth. At the same time they evince a concern that borders on a fetish with the pedigree of the music, styles, and objects that identify their focal concerns.When did hipster subculture begin? While commonly viewed as a recent trend among middle-class youth, the history of the group stretches back to the early decades of the 1900s. In the 1940s, black American jazz music was on the rise in the United States. Musicians were known as



Figure 3.25. Intellectual and trendy, today's hipsters define themselves through cultural irony. [Long description] (Photo courtesy of Lorena Cupcake/Wikimedia Commons)

hepcats and had a smooth, relaxed style that contrasted with more conservative and mainstream expressions of cultural taste. Norman Mailer (1923 – 2007), in his essay *The White Negro: Superficial Reflections on the Hipster* (1957), defined those who were "hep" or "hip" as largely white youth living by a black jazz-inspired code of resistance, while those who were "square" lived according to society's rules and conventions.As hipster attitudes spread and young people were increasingly drawn to alternative music and fashion, attitudes and language derived from the culture of jazz were adopted. Unlike the vernacular of the day, hipster slang was purposefully ambiguous. When hipsters said, "It's cool, man," they meant not that everything was good, but that it was the way it was.

By the 1950s, another variation on the subculture was on the rise. The beat generation, a title coined by Quebecois-American writer Jack Kerouac (1922 – 1969), was defined as a generation that was nonconformist and anti-materialistic. Prominent in this movement were writers and poets who listened to jazz, studied Eastern religions, experimented with different states of experience, and embraced radical politics of personal liberation. They bummed around, hitchhiked the country, sought experience, and lived marginally. Even in the early stages of the development of the subculture there was a difference between the emphasis in beat and hipster styles:

> . . . the hipster was . . . [a] typical lower-class dandy, dressed up like a pimp, affecting a very cool, cerebral tone – to distinguish him from the gross, impulsive types that surrounded him in the ghetto – and aspiring to the finer things in life, like very good "tea", the finest of sounds – jazz or Afro-Cuban . . . [whereas] . . . the Beat was originally some earnest middle-class college boy like Kerouac, who was stifled by the cities and the culture he had inherited and who wanted to cut out for distant and exotic places, where he could live like the "people", write, smoke and meditate (Goldman as cited in Hebdige, 1979)

While the beat was focused on inner experience, the hipster was focused on the external style.

By the end of the 1950s, the influence of jazz was winding down and many traits of hepcat culture were becoming mainstream. College students, questioning the relevance and vitality of the American dream in the face of post-war skepticism, clutched copies of Kerouac's *On the Road*, dressed in berets, black turtlenecks, and black-rimmed glasses. Women wore black leotards and grew their hair long. The subculture became visible and was covered in *Life* magazine, *Esquire*, *Playboy*, and other mainstream media. Herb Caen (1916 – 1997), a San Francisco journalist, used the



Figure 3.26. In the 1940s, American hipsters were associated with the "cool" culture of jazz. (Photo courtesy of William P. Gottlieb/ Ira and Leonore S. Gershwin Fund Collection, Music Division, Library of Congress)

suffix from *Sputnik 1*, the Russian satellite that orbited Earth in 1957, to dub the movement's followers as "beatniks." They were subsequently lampooned as lazy layabouts in television shows like *The Many Loves of Dobie Gillis* (1959 – 1963) or dangerous, drug-abusing delinquents in movies like *High School Confidential* (1958).



Figure 3.27. By the late 1950s and early 1960s beatnik subculture was being parodied. [Long Description] (Image courtesy of Sarah/ Flickr)

As the beat generation faded, a new related movement began. It too focused on breaking social boundaries, but also advocated freedom of expression, philosophy, and love. It took its name from the generations before; in fact, some

theorists claim that the beats themselves coined the term to describe their children. Over time, the "little hipsters" of the 1960s and 70s became known simply as hippies. Others note that hippie was a derogatory label invented by the mainstream press to discredit and stereotype the movement and its non-materialist aspirations.Contemporary expressions of the hipster rose out of the hippie movement in the same way that hippies evolved from the beats and beats from hepcats. Although today's hipster may not seem to have much in common with the jazz-inspired youth of the 1940s, or the long-haired back to the land movement of the 1960s, an emphasis on nonconformity persists. The sociologist Mark Greif set about investigating the hipster subculture of the United States and found that much of what tied the group together was not a specific set of fashion or music choices, nor a specific point of contention with the mainstream. What has emerged, rather, is an appropriation of consumer capitalism that seeks authenticity in and of itself.In his *New York Times* article "The Hipster in the Mirror" Greif wrote, "All hipsters play at being the inventors or first adopters of novelties: pride comes from knowing, and deciding, what's cool in advance of the rest of the world" (2010). What tends to be cool is an ironic pastiche of borrowed styles or tastes that signify other identities or histories: alternative music (sometimes very obscure), used vintage clothing, organic and artisanal foods and products, single gear bikes, and countercultural values and lifestyles.Young people are often drawn to oppose mainstream conventions. Much as the hepcats of the jazz era opposed common culture with carefully crafted appearances of coolness and relaxation, modern hipsters reject mainstream values with a purposeful apathy. Ironic, cool to the point of non-caring, and intellectual, hipsters continue to embody a subculture while simultaneously impacting mainstream culture.

Global Culture

The integration of world markets and technological advances of the last decades have allowed for greater exchange between cultures through the processes of **globalization** and **diffusion**. Beginning in the 1970s, Western governments began to deregulate social services while granting greater liberties to private businesses. As a result of this process of neoliberalization, world markets became dominated by unregulated, international flows of capital investment and new multinational networks of corporations. A global economy emerged to replace nationally based economies. We have since come to refer to this integration of international trade and finance markets as globalization. Increased communications and air travel have further opened doors for international business relations, facilitating the flow not only of goods but of information and people as well (Scheuerman, 2010). Today, many Canadian companies set up offices in other nations where the costs of resources and labour are cheaper. When a person in Canada calls to get information about banking, insurance, or computer services, the person taking that call may be working in India or Indonesia.

Alongside the process of globalization is diffusion, which is the spread of material and nonmaterial culture. While globalization refers to the integration of markets, diffusion relates a similar process to the integration of global cultures. Middle-class North Americans can fly overseas and return with a new appreciation of Thai noodles or Italian gelato. Access to television and the internet has brought the lifestyles and values portrayed in Hollywood sitcoms into homes around the globe. Twitter feeds from public demonstrations in one nation have encouraged political protesters in other countries. When this kind of diffusion occurs, material objects and ideas from one culture are introduced into another.

The increasing flows of global migration and movement also facilitate the diffusion of cultural ideas and artifacts as people from around the world spread out into global **diasporas**: The dispersions of a people from their original homeland. As Arjun Appadurai (1996) suggests, "More people than ever before seem to imagine routinely the possibility that they or their children will live and work in places other than where they were born: this is the wellspring of the increased rates of migration at every level of social, national, and global life." This likelihood of movement, whether actual or imagined, changes the cultural coordinates of how people see themselves in the world.

All migrants, refugees, temporary foreign workers, or travellers bring their beliefs, attitudes, languages, cuisines, music, religious practices, and other elements of local ways of life with them when they move, and they encounter new ones in the places where they arrive. What would appear to be different in the contemporary era of global migration is the way in which electronic media make it possible for migrants and travellers to keep in touch daily with not only friends and family, but also favourite TV shows, current events, sports, music, and other elements of culture from home. In the same way, electronic media give migrants access to the culture of their new homes just as they allow local residents to imagine future homes elsewhere in the world. In the era of globalization, the experience of culture is increasingly disembedded

from location. The ways people imagine themselves and define their individual attachments, interests, and aspirations criss-cross and intertwine the divisions between cultures formerly established by the territorial boundaries of societies.

Hybridity in cultures is one of the consequences of the increased global flows of capital, people, culture, and entertainment. Hybrid cultures refer to new forms of culture that arise from cross-cultural exchange, especially in the aftermath of the colonial era. On one hand, there are blendings of different cultural elements that had at one time been distinct and locally based: fusion cuisines, mixed martial arts, and New Age shamanism. On the other hand, there are processes of indigenization and appropriation in which local cultures adopt and redefine foreign cultural forms. The classic examples are the cargo cults of Melanesia in which isolated Indigenous peoples "re-purposed" Western goods (cargo) within their own ritualistic practices in order to make sense of Westerners' material wealth. Other examples include Arjun Appadurai's discussion of how the colonial Victorian game of cricket has been taken over and absorbed as a national passion into the culture of the Indian subcontinent (1996). Similarly, Chinese "duplitecture" reconstructs famous European and North American buildings, or in the case of Hallstatt, Austria, entire villages, in Chinese housing developments (Bosker, 2013). As cultural diasporas or emigrant communities begin to introduce their cultural traditions to new homelands and absorb the cultural traditions they find there, opportunities for new and unpredictable forms of hybrid culture emerge.

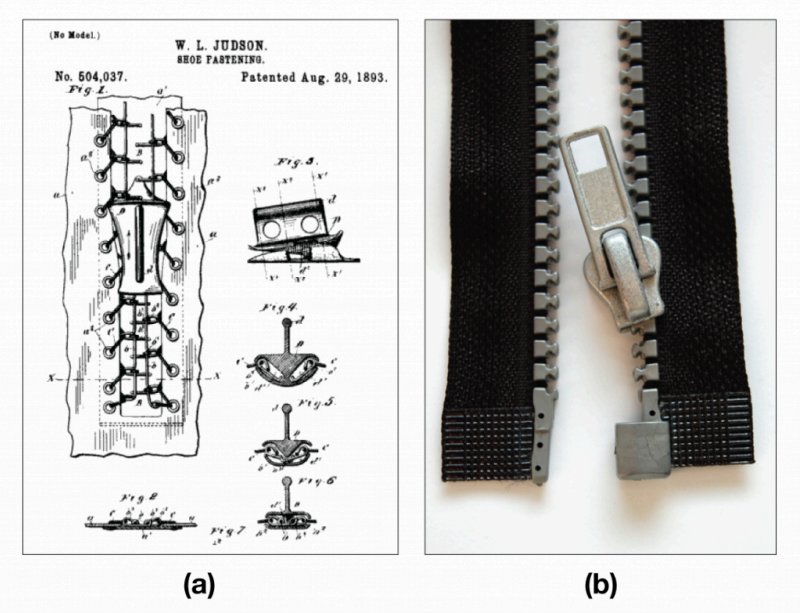


Figure 3.28. Officially patented in 1893 as the "clasp locker" (a), the zipper did not diffuse through society for many decades. Today, it is immediately recognizable around the world. (Photo (a) courtesy of U.S. Patent Office/Wikimedia Commons; Photo (b) courtesy of Rabensteiner/Wikimedia Commons)

Making Connections: Big Picture

Is There a Canadian Identity?

The recent purchase of the Canadian coffee and donut chain Tim Hortons by 3G Capital, the American-Brazilian consortium that owns Burger King, raised questions about Canadian identity that never seem far from the surface in discussions of Canadian culture. For example, an article by Joe Friesen in *The Globe and Mail* (2014) emphasized the potential loss to Canadian culture by the sale to foreign owners of a successful Canadian-owned business that is also a kind of Canadian institution. Tim Hortons's self-promotion has always emphasized its Canadianness: from its original ownership partner, Tim Horton (1930 – 1974), who was a Toronto Maple Leafs defenceman, to being a kind of "anti-Starbucks," the place where "ordinary Canadians" go. Friesen's article reads a number of Canadian characteristics into the brand image of Tim Hortons. For example, the personality of Tim Horton himself is equated with Canadianness



Figure 3.29. To what degree does Tim Hortons represent Canadian culture? Is it a cultural icon endangered by its sale to the international consortium 3G Capital, or does it already manipulate Canadians' desire to identify with their national culture in order to sell a product? (Image courtesy of Doug/ Flickr).

of the chain: "He wasn't a flashy player, but he was strong and reliable, traits in keeping with Canadian narratives of solidity and self-effacement" (Friesen).

How do we understand Canadian culture and Canadian identity in this example? Earlier in the chapter, we described culture as a product of the socioeconomic formation. Therefore, if we ask the question of whether a specific Canadian culture or Canadian identity exists, we would begin by listing a set of distinctive Canadian cultural characteristics and then attempt to explain their distinctiveness in terms of the way the Canadian socioeconomic formation developed.

Seymour Martin Lipset (1990) famously described several characteristics that distinguished Canadians from Americans:

- Canadians are less self-reliant and more dependent on state programs than Americans to provide for everyday needs of citizens.
- Canadians are more "elitist" than Americans in the sense that they are more respectful and deferential towards authorities.
- Canadians are less individualistic and more collectivistic than Americans, especially in instances where personal liberties conflict with the collective good.
- Overall, Canadians are more conservative than Americans, and less likely to embrace a belief in progress or a forward looking, liberal outlook on political or economic issues.

Lipset's explanation for these differences is that while both Canada and the United States retain elements from their British colonial experiences, like their language and legal systems, their founding historical events were opposites: the United States was created through violent revolution against British rule (1775-1783); whereas, Canada's origins were counter revolutionary. Canada was settled in part by United Empire Loyalists who fled America to remain loyal to Britain, and it did not become an independent nation state until it was created by an act of the British Parliament (the British North America Act of 1867). (Note: The idea that Canada — with its influential socialist tradition responsible for Canada's universal health care, welfare and employment insurance, strong union movement, culture of collective responsibility, etc. — is more conservative than the United States may strike the reader as strange. Lipset's assessment is based on uniquely American cultural definitions of conservatism and liberalism.) While Lipset's analysis is disputed, especially by those who do not see American and Canadian cultural differences as being so great (Baer et al., 1990), the logic of his analysis is to see the cultural difference between the nations as a variable dependent on their different socioeconomic formations.

In this analysis, the national characteristics that Friesen argues are embodied by Tim Hortons — modesty, unpretentiousness, politeness, respect, etc. — would be seen as qualities that emerged as a result of a uniquely Canadian

historical socioeconomic development. However, how well do they actually represent Canadian culture? As we saw earlier in the chapter, one prominent aspect of contemporary Canadian cultural identity is the idea of multiculturalism. The impact of globalization on Canada has been increased cultural diversity (see Chapter 11). The 2011 census noted that visible minorities made up 19.1 percent of the Canadian population, or almost one out of every five Canadians. In Toronto and Vancouver almost half the population are visible minorities. In a certain way, the existence of diverse cultures in Canada undermines the notion that a unified Canadian culture exists. Canada would appear to be a fragmented nation of hyphenated identities — British-Canadians, French-Canadians, Chinese-Canadians, South Asian-Canadians, Caribbean-Canadians, Aboriginal-Canadians, etc. — each with its unique cultural traditions, languages, and viewpoints. In what way are we still able to speak about *a* Canadian identity except insofar as it is defined by multiculturalism; essentially many identities?

3.4. Culture as Restriction: Rationalization and Commodification

In the previous section we examined culture in its innovative guise. Culture in this guise is the site of "all thoughts, dreams, ideas, beliefs, myths, intuitions, and inspirations brought into being by the human imagination since the dawn of consciousness" as Wade Davis put it (2002). Culture is what enables humans to go beyond the "given" of their biological and social reality. The innovations of high culture in expanding the range of human sensibility and the inventiveness of pop culture, subculture, and globally hybrid culture in creating and diffusing new cultural forms attests to the innovative side of culture. However, culture can also be examined in its restrictive guise, as source of restriction on human possibilities. Two contemporary modes of culture as restriction can be seen in the processes of rationalization and consumerism.

Rationalization



Figure 3.30. Harold Lloyd in Safety Last (1923). What is the relationship between time and stress? (Image courtesy of Wikimedia Commons)

Max Weber's analysis of modern society centres on the concept of **rationalization**. Arguably, the primary focus of Weber's entire sociological *oeuvre* was to determine how and why Western civilization and capitalism developed where and when they did. Why was the West the West? Why did the Western world modernize and develop modern science, industry, military, and democracy first when, for centuries, Asia, the Indian subcontinent, and the Middle East were technically, scientifically, and culturally more advanced than the West?

Weber argued that the modern forms of society developed in the West because of the process of rationalization: the general tendency of modern institutions and most areas of life to be transformed by the application of instrumental reason — choosing the most efficient means to achieve defined goals — and the overcoming of "magical" thinking (which in Chapter 1 we referred to as the "disenchantment of the world"). In modernity, everything is subject to the cold and rational gaze of the scientist, the technician, the bureaucrat, and the business person. "There are no mysterious incalculable forces that come into play… rather… one can, in principle, master all things by calculation. This means that the world is disenchanted" (Weber, 1919). As the impediments toward rationalization were removed, organizations and institutions were restructured on the principle of maximum efficiency and specialization, while older traditional (inefficient) types of organization were gradually eliminated. Weber's question was, what are the consequences of rationality for everyday life, for the social order, and for the spiritual fate of humanity?

Through rationalization, all of the institutional structures of modern society are reorganized on the principles of efficiency, calculability, and predictability, which are the bases of the "technical and economic conditions of machine production" that Weber refers to in passages from *The Protestant Ethic* (1904). As rationalization transforms the institutional and organizational life of modernity, other forms of social organization are eliminated and other purposes of life—spiritual, moral, emotional, traditional, etc.—become irrelevant. Life becomes irrevocably narrower in its focus, and other values are lost. Our attitude towards our own lives becomes oriented to maximizing our own efficiency and eliminating non-productive pursuits and downtime. This is the key to the metaphor of the **iron cage** by which Weber evokes the new powers of production and organizational effectiveness, the increasingly narrow specialization of tasks and the loss of the Enlightenment ideals of a well-rounded individual and a "full and beautiful humanity." Having forgotten its spiritual or other purposes of life, humanity succumbed to an order "now bound to the technical and economic conditions of machine production" (Weber, 1904). The modern subject in the iron cage is essentially a narrow specialist or bureaucrat, "only a single cog in an ever-moving mechanism which prescribes to him an essentially fixed route of march" (Weber, 1922).

One of the consequences of the rationalization of everyday life is stress. In 2010, 27 percent of working adults in Canada described their day-to-day lives as highly stressful (Crompton, 2011). Twenty-three percent of all Canadians aged 15 and older reported that most days were highly stressful in 2013 (Statistics Canada, 2014). In the case of stress, rationalization is a double-edged sword in that it allows people to get more things done per unit of time more efficiently in order to "save time," but ironically efficiency–as a means to an end–tends to replace other goals in life and becomes an end in itself. The focus on efficiency means that people regard time as a kind of limited resource in which to achieve a maximum number of activities. The irrationality in rationalization is: Saving time for what? Are we able to take time for activities (including sleep) which replenish us or enrich us? Even the notions of "taking time" or "spending quality time" with someone uses the metaphor of time as a kind of expenditure in which we use up a limited resource. Stress is in many respects a product of our modern "rational" relationship to time. As we can see in the table below, for a significant number of people, there is simply not enough time in the day to accomplish what we set out to do.

Table 3.1. Perceptions of time for the population aged 15 and over, by age group, Canada, 2010

[Skip Table]

Perceptions of time	Age group							
	15 and over	15 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 to 74	75 and over
Do you plan to slow down in the coming year?	19%	13%	16%	21%	22%	23%	16%	20%
Do you consider yourself a workaholic?	25%	22%	29%	31%	28%	23%	18%	14%
When you need more time, do you tend to cut back on your sleep?	46%	63%	60%	59%	45%	31%	20%	15%
At the end of the day, do you often feel that you have not accomplished what you had set out to do?	41%	34%	46%	48%	46%	40%	29%	35%
Do you worry that you don't spend enough time with your family or friends?	36%	34%	47%	53%	41%	27%	14%	10%
Do you feel that you're constantly under stress trying to accomplish more than you can handle?	34%	35%	41%	47%	40%	27%	15%	10%
Do you feel trapped in a daily routine?	34%	33%	41%	46%	40%	28%	15%	15%
Do you feel that you just don't have time for fun any more?	29%	20%	36%	43%	38%	23%	11%	11%
Do you often feel under stress when you don't have enough time?	54%	65%	66%	69%	59%	41%	22%	16%
Would you like to spend more time alone?	22%	19%	30%	35%	24%	15%	9%	7%

Note: The percentages represent the proportion of persons who answered "yes" to the questions on perceptions of time.
Source: Statistics Canada, General Social Survey, 2010 (Statistics Canada, 2011).

The Commodity, Commodification, and Consumerism as a Way of Life



Figure 3.31. Barbara Kruger's subversive billboard art piece "I shop therefore I am" is here revised as an actual advertising slogan in a Selfridges department store in Birmingham, England. Is this the ultimate in cynical advertising or simply a fact of life in the age of consumerism? (Photo courtesy of Mark Hillary/ Flickr)

The **commodity** is simply an object, service, or a "good" that has been produced for sale on the market. **Commodification** is the process through which objects, services, or goods are increasingly turned into commodities, so they become defined more in terms of their marketability and profitability than by their intrinsic characteristics. Prior to the invention of the commodity market, economic life revolved around bartering or producing for immediate consumption. Real objects like wool or food were exchanged for other real objects or were produced for immediate consumption according to need. The commodity introduces a strange factor into this equation because in the marketplace objects are exchanged for money. They are produced in order to be sold in the market. Their value is determined not just in regard to their unique qualities, their purpose, or their ability to satisfy a need (i.e., their "use value"), but also their monetary value or "exchange value" (i.e., their price). When we ask what something is worth, we are usually referring to its price.

This monetization of value is strange in the first place because the medium of money allows for incomparable, concrete things or use values to be quantified and compared. Twenty dollars will get you a chicken, a novel, or a hammer; these fundamentally different things all become equivalent. It is strange in the second place because the use of money to define the value of commodities makes the commodity appear to stand alone, as if its value was independent of the labour that produced it or the needs it was designed to satisfy. We see the object and imagine the qualities it will endow us with: a style, a fashionability, a personality type, or a tribal affiliation (e.g., PC people vs. Mac people). We do not recognize the labour and the social relationships of work that produced it, nor the social relationship that tie us to its producers when we purchase it. Karl Marx (1818 – 1883) called this phenomenon **commodity fetishism** (1867).



Figure 3.32. The Mac vs. PC ad campaign plays on the idea that the computer you purchase defines your style of life, or vice versa. In this way commodities and their branding strategies insinuate themselves into our self-definitions [Long Description] (Image courtesy of Jose Antonio Gelado/Flickr)

With the increased importance of maintaining high levels of commodity turn over and consumption that emerged with the system of late capitalism, commodity fetishism plays a powerful role in producing ever new wants and desires. **Consumerism** becomes a way of life. Consumerism refers to the way in which we define ourselves in terms of the commodities we purchase. To the degree that our identities become defined by the pattern of our consumer preferences, the commodity no longer exists to *serve* our needs but to *define* our needs. As Barbara Kruger put it, the motto of consumer culture is not "I think therefore I am" but "I shop therefore I am." Thinking is precisely what consumerism entices us *not* to do, except in so far as we calculate the prices of things.

3.5. Theoretical Perspectives on Culture

Music, fashion, technology, and values — all are products of culture. But what do they mean? How do sociologists perceive and interpret culture based on these material and nonmaterial items? Let's finish our analysis of culture by reviewing material and nonmaterial items in the context of three theoretical perspectives: functionalism, conflict theory, and symbolic interactionism.

Functionalists view society as a system in which all parts work — or function — together to create society as a whole. In this way, societies need culture to exist. Cultural norms function to support the fluid operation of society, and cultural values guide people in making choices. Talcott Parsons (1902 – 1979) referred to the function of culture as "latent pattern maintenance" meaning that the cultural practices that reproduce and circulate symbolic meanings and codes serve the function of maintaining social patterns of behaviour and facilitating orderly pattern change. Culture functions to ensure that the "meaning of life" remains stable.

By focusing on the function that culture plays in maintaining the stable equilibrium of society as a whole, functionalism can often provide interesting insights into cultural activities that seem irrational and bizarre on the surface. Bronislaw Malinowski (1884 – 1942) described the way that the Trobriand Islanders of New Guinea used magic at each stage of preparation for fishing (1925). From a rationalized, calculative point of view, magic ritual has nothing to do with the ability to catch fish. Fishing is a practical activity. However, as Malinowski pointed out, fishing for the Trobriand Islanders was also a risky and uncertain activity. It was dangerous; weather was unpredictable; the whereabouts of fish variable. Magic provided the fishermen with a sense of control over their environment and a sense of confidence that enabled them to venture out into the dangerous waters day after day. Whether magic "worked" or not, it performed an important and rational function in the economic life of the Islanders. It provided a stable pattern of meaning that empowered the fishermen to risk their lives to bring back an essential food resource.

Functionalists argue that cultural practices play a similar role in modern societies. The game of hockey, for example, in which highly-skilled men and women chase a disk of rubber around a frozen sheet of ice, risking injury and expending energy for nonproductive purposes, is on the surface of it an irrational and crazy activity. Yet millions of people watch hockey; millions of dollars are spent on it; millions of people's identities are defined by their fandom; and millions of people's collective sense of self-worth can hang on the fortunes and failures of their favourite hockey teams. Hockey is both, practically speaking, useless and yet clearly a highly valued activity. Why? As Durkheim argued with respect to religious rituals and totems, when people come together and focus their attention on a common object — in this case, a disk of rubber — thoughts and feelings pass back and forth between them until they take on a supra-individual force, detached from the individuals themselves. A pre-rational collective consciousness emerges that provides the basis for group solidarity or a moral sense of group togetherness. Hockey functions as a site of collective convergence in a society that otherwise threatens to dissolve into incoherence as people's everyday lives diverge in pursuit of individual self-interests.

In addition, many people point to the latent functions of hockey, in that it provides an outlet for energies that might otherwise be directed to negative activities: It provides the basis for the cultivation of the self in the pursuit of excellence; it provides important lessons on the value of team play; and it provides an exercise activity that contributes to the health of the population. As many Canadians know, it is often easier to get a good physical workout when you are chasing a puck or a hockey ball than it is to convince yourself to go jogging in the cold or to do another repetition down at the gym.

Symbolic interactionism is a sociological perspective that is most concerned with the face-to-face interactions between members of society. Interactionists see culture as being created and maintained by the ways people interact and how individuals interpret each other's actions. Proponents of this theory conceptualize human interactions as a continuous process of deriving meaning from both objects in the environment and the actions of others. This is where the term "symbolic" comes into play. Every object and action has a symbolic meaning, and language serves as a means for people to represent and communicate their interpretations of these meanings to others. Those who believe in symbolic interactionism perceive culture as highly dynamic and fluid, as it is dependent on how meaning is interpreted and how individuals interact when conveying these meanings.

A symbolic interactionist approach to fashion, for example, would emphasize that fashion is a language that we use to interpret who others are and communicate who we are. Clothing fashions in particular represent an extremely intricate language of interpersonal communication, as anyone who has gone shopping for clothes with a friend is well aware. What variables are involved in the question: "Does this look good on me?" Clothes are never simply "functional," because even the most functional and practical Mountain Equipment Co-op style clothing makes a statement about the wearer. Georg Simmel (1858-1918) noted that, while extremely transitory, the establishment of fashions always has to contend with two seemingly contradictory tendencies — the desire of individuals to fit in and conform to what is fashionable, and the desire of individuals to stand out as individuals (1904). Being fashionable involves a highly nuanced negotiation between these two poles.



Figure 3.33. This statue of Superman stands in the centre of Metropolis, Illinois. His pedestal reads "Truth — Justice — The American Way." How would a functionalist interpret this statue? What does it reveal about the values of American culture? (Photo courtesy of David Wilson/Flickr)

Critical sociologists view social structure as inherently unequal and based on power differentials related to issues like class, gender, race, and age. For a critical sociologist, culture is not a unified tradition that is experienced the same way by all people in a society. The female genital mutilation practiced by several social groups in Africa and Asia is a cultural practice that is rooted in gender inequality. It is an example of a cultural practice that reinforces and perpetuates inequalities and differences in power. Unlike the functionalists, who examine culture in terms of its function in social cohesion, or symbolic interactionists, who emphasize how people come to mutual understandings through cultural practices and interactions, critical sociologists examine how inequalities and power relationships are maintained by a culture's value system.



Figure 3.34. Women serving in the armed forces during World War I, including nurses, were the only women who were allowed to vote in federal elections. It was not until 1919 that the rest of women in Canada could vote federally. (Photo Courtesy of William Rider-Rider/Wikimedia Commons)

Some norms, formal and informal, are practiced at the expense of others. Following Confederation in 1867, women were not allowed to vote in federal elections in Canada until 1919, and it was not until 1940 that they could vote in provincial elections in Quebec. (Women property owners had been able to vote prior to Confederation.) It was not until 1947 and

1948 that Canadians of Japanese, Chinese, and South Asian origins were permitted to vote. Aboriginal Canadians, who had been able to vote in some regions up until 1898, had their rights revoked and were not permitted to vote federally again until 1960. In each case of discrimination, it was the dominant culture's attitudes toward the subordinate groups that served as the rationale for refusing them the franchise. For example, in 1898 the Member of Parliament for Saint John argued that "Indians knew no more of politics 'than a child two years old'" (Elections Canada, 2014). Because of prevailing paternalistic and racist attitudes, it was argued that Aboriginal people would somehow be more susceptible to manipulation by politicians than other Canadians.

Culture as Source of Innovation and Constraint



Figure 3.35. This child's clothing may be culturally specific, but her facial expression is universal. (Photo courtesy of Beth Rankin/ Flickr)

Culture in general is a site of two opposing tendencies: One is the way that cultures around the world lay down sets of rules or norms which constrain, restrict, habitualize and fix forms of life; the other is the way that cultures produce endlessly innovative and diverse solutions to problems like nutrition. Cultures both constrain and continually go beyond constraints.

We began this chapter by asking what is culture. Culture comprises all the practices, beliefs, and behaviours of a society. Because culture is learned, it includes how people think and express themselves. While we may like to consider ourselves unique individuals, we must acknowledge the impact of culture; we inherit thought and language that shapes our perceptions and patterns our behaviour, including about issues of family and friends, and faith and politics. In this sense culture defines the normative patterns that constrain us to live according to the given rules. On the other hand, the incredible variety of ways of thinking, ways of being, and ways of orienting oneself on the Earth, which Wade Davis calls the ethnosphere, attests to the endlessly innovative responses to the human condition that culture affords. Human possibilities are not determined by society or biology. Culture also reflects the imaginative capacity of human beings to go beyond what is given.

To an extent, culture is a social comfort. After all, sharing a similar culture with others is precisely what defines societies. Nations would not exist if people did not coexist culturally. There could be no societies if people did not share heritage and language, and civilization would cease to function if people did not agree to similar values and systems of social control. Culture is preserved through transmission from one generation to the next, but it also evolves through processes of innovation, discovery, and cultural diffusion. We may be restricted by the confines of our own culture, but also we have the ability to question values and make conscious decisions. No better evidence of this freedom exists than the amount of cultural diversity within our own society and around the world. The more we study another culture, the better we become at understanding our own.

Key Terms

androcentricism: A perspective in which male concerns, male attitudes, and male practices are presented as "normal" or define what is significant and valued in a culture.

beliefs: Tenets or convictions that people hold to be true.

commodity: An object, service, or good that has been produced for sale on the market.

commodity fetishism: Regarding commodities as objects with inherent qualities independent of the labour that produced them or the needs they were designed to satisfy.

commodification: The process through which objects, services, or goods are turned into commodities.

consumerism: The tendency to define ourselves in terms of the commodities we purchase.

counterculture: A group that rejects and opposes society's widely accepted cultural patterns.

cultural imperialism: The deliberate imposition of one's own cultural values on another culture.

cultural relativism: The practice of assessing a culture by its own standards, and not in comparison to another culture.

cultural universals: Patterns or traits that are globally common to all societies.

culture: Shared beliefs, values, and practices.

culture lag: The gap of time between the introduction of material culture and nonmaterial culture's acceptance of it.

culture shock: An experience of personal disorientation when confronted with an unfamiliar way of life.

detournement: The conscious subversion of messages, signs, and symbols by altering them slightly.

diaspora: The dispersion of a people from their original homeland.

diffusion: The spread of material and nonmaterial culture from one culture to another.

discoveries: Things and ideas found from what already exists.

ethnocentrism: Evaluating another culture according to the standards of one's own culture.

folkways: Norms based on social preferences that direct appropriate behaviour in the day-to-day practices and expressions of a culture.

formal norms: Established, written rules.

geneticism: A form of biological determinism that suggests the qualities of human life are caused by genes.

globalization: The integration of international trade and finance markets.

high culture: Forms of cultural experience characterized by formal complexity, eternal values, or intrinsic authenticity.

hybridity: New forms of culture that arose from cross-cultural exchange in the aftermath of the colonial era.

ideal culture: The standards a society would like to embrace and live up to.

informal norms: Casual behaviours that are generally and widely conformed to.

innovation: New objects or ideas introduced to a culture for the first time.

invention: Combining pieces of existing reality into new forms.

iron cage: Max Weber's metaphor for the modern condition of life circumscribed by the demand for maximum efficiency.

language: A symbolic system of communication.

material culture: The objects or belongings of a group of people.

mores: Norms based on social requirements which are based on the moral views and principles of a group.

nonmaterial culture: The ideas, attitudes, and beliefs of a society.

norms: The visible and invisible rules of conduct through which societies are structured.

popular culture: Mainstream, widespread patterns among a society's population.

postmodern culture: The form of culture that comes after modern culture characterized by the playful mixture of forms and "incredulity towards metanarratives".

real culture: The way society really is; based on what actually occurs and exists.

Sapir–Whorf hypothesis: The idea that people understand the world based on their form of language.

sanctions: A way to authorize or formally disapprove of certain behaviours.

social control: A way to encourage conformity to cultural norms.

society: The structure of a social group of people who interact within a definable territory and who share a culture.

socioeconomic formation: The concrete set of social structures that form around a specific mode of production or economic system.

subculture: A group that shares a specific identity apart from a society's majority, even as the members exist within a larger society.

symbol: Gestures or objects that have meanings associated with them that are recognized by people who share a culture.

taboos: Strong prohibitions based on deeply held sacred or moral beliefs.

values: A culture's standard for discerning desirable states in society (what is true, good, just, or beautiful).

Section Summary

3.1. What Is Culture?

Though "society" and "culture" are often used interchangeably, they have different meanings. A society is a group of people sharing a community and culture. Culture generally describes the shared behaviours and beliefs of these people, and includes material and nonmaterial elements. Our experience of cultural difference is influenced by our ethnocentrism and androcentrism.

3.2. Elements of Culture

A culture consists of many elements, such as the values and beliefs of its society. Culture is also governed by norms, including laws, mores, and folkways. The symbols and language of a society are key to developing and conveying culture.

3.3. Pop Culture, Subculture, and Cultural Change

Sociologists recognize high culture and popular culture within societies. Societies also comprise many subcultures—smaller groups that share an identity. Countercultures reject mainstream values and create their own cultural rules and norms. Through invention or discovery, cultures evolve via new ideas and new ways of thinking. In many modern cultures, the cornerstone of innovation is technology; the rapid growth of which can lead to cultural lag. Technology is also responsible for the spread of both material and nonmaterial culture that contributes to globalization.

3.5. Theoretical Perspectives on Culture

There are three major theoretical approaches toward the interpretation of culture. A functionalist perspective acknowledges that there are many parts of culture that work together as a system to fulfill society's needs. Functionalists view culture as a reflection of society's values. An interactionist is primarily interested in culture as experienced in the daily interactions between individuals and the symbols that make up a culture. Critical sociologists see culture as inherently unequal, based on factors like gender, class, race, and age. Various cultural and sociological occurrences can be explained by these theories; however, there is no one "right" view through which to understand culture.

Section Quiz

3.1. What Is Culture?

1. The terms _____ and _____ are often used interchangeably, but have nuances that differentiate them.

1. imperialism and relativism
2. culture and society
3. society and ethnocentrism
4. ethnocentrism and xenocentrism

2. The American flag is a material object that denotes the United States of America; however, there are certain connotations that many associate with the flag, like bravery and freedom. In this example, what are bravery and freedom?

1. symbols
2. language
3. material culture
4. nonmaterial culture

3. The belief that one's culture is inferior to another culture is called?

1. ethnocentrism
2. nationalism
3. xenocentrism
4. imperialism

4. Rodney and Elise are American students studying abroad in Italy. When they are introduced to their host families, the families kiss them on both cheeks. When Rodney's host brother introduces himself and kisses Rodney on both cheeks, Rodney pulls back in surprise. Where he is from, unless they are romantically involved, men do not kiss one another. This is an example of:

1. culture shock
2. imperialism
3. ethnocentrism
4. xenocentrism

5. Most cultures have been found to identify laughter as a sign of humour, joy, or pleasure. Likewise, most cultures recognize music in some form. Music and laughter are examples of:

1. relativism
2. ethnocentrism
3. xenocentrism
4. universalism

3.2. Elements of Culture

6. A nation's flag is:

1. a symbol
2. a value
3. a culture
4. a folkway

7. The existence of social norms, both formal and informal, is one of the main things that inform _____, otherwise known as a way to encourage social conformity.

1. values
2. sanctions
3. social control
4. mores

8. The biggest difference between mores and folkways is that:

1. mores are primarily linked to morality, whereas folkways are primarily linked to being commonplace within a culture
2. mores are absolute, whereas folkways are temporary
3. mores refer to material culture, whereas folkways refer to nonmaterial culture
4. mores refer to nonmaterial culture, whereas folkways refer to material culture

9. The notion that people cannot feel or experience something that they do not have a word for can be explained by:

1. linguistics
2. Sapir-Whorf
3. ethnographic imagery
4. bilingualism

10. Cultural sanctions can also be viewed as ways that society:

1. establishes leaders
2. determines language
3. regulates behaviour
4. determines laws

3.3. Pop Culture, Subculture, and Cultural Change

11. An example of high culture is _____, whereas an example of popular culture would be _____.

1. Dostoevsky style in film; *American Idol* winners
2. medical marijuana; film noir
3. country music; pop music
4. political theory; sociological theory

12. The Ku Klux Klan is an example of what part of culture?

1. Counterculture
2. Subculture
3. Multiculturalism
4. Afrocentricity

13. Modern-day hipsters are an example of:

1. ethnocentricity
2. counterculture
3. subculture
4. high culture

14. Your 83-year-old grandmother has been using a computer for some time now. As a way to keep in touch, you

frequently send emails of a few lines to let her know about your day. She calls after every email to respond point by point, but she has never emailed a response back. This can be viewed as an example of:

1. cultural lag
2. innovation
3. ethnocentricity
4. xenophobia

15. Some jobs today advertise in multinational markets and permit telecommuting in lieu of working from a primary location. This broadening of the job market and the way that jobs are performed can be attributed to:

1. cultural lag
2. innovation
3. discovery
4. globalization

16. The major difference between invention and discovery is:

1. invention is based on technology, whereas discovery is usually based on culture
2. discovery involves finding something that already exists, but invention puts things together in a new way
3. invention refers to material culture, whereas discovery can be material or theoretic, like laws of physics
4. invention is typically used to refer to international objects, whereas discovery refers to that which is local to one's culture

17. That McDonald's is found in almost every country around the world is an example of:

1. globalization
2. diffusion
3. culture lag
4. xenocentrism

3.5. Theoretical Perspectives on Culture

18. A sociologist conducts research into the ways that Hispanic American students are historically underprivileged in the American education system. What theoretical approach is the sociologist using?

1. symbolic interactionism
2. functionalism
3. conflict theory
4. ethnocentrism

19. The Occupy Wall Street movement of 2011 grew to be an international movement. Supporters believe that the economic disparity between the highest economic class and the mid to lower economic classes is growing at an exponentially alarming rate. A sociologist who studies that movement by examining the interactions between members at Occupy camps would most likely use what theoretical approach?

1. symbolic interactionism
2. functionalism
3. conflict theory
4. ethnocentrism

20. What theoretical perspective views society as having a system of interdependent inherently connected parts?

1. sociobiology
2. functionalism
3. conflict theory
4. ethnocentrism

21. The "American Dream"—the notion that anybody can be successful and rich if they work hard enough—is most commonly associated with which sociological theory?

1. sociobiology
2. functionalism
3. conflict theory
4. ethnocentrism

[Quiz answers at end of chapter]

Short Answer

3.1. What Is Culture?

1. Examine the difference between material and nonmaterial culture in your world. Identify ten objects that are part of your regular cultural experience. For each, then identify what aspects of nonmaterial culture (values and beliefs) that these objects represent. What has this exercise revealed to you about your culture?
2. Do you feel that feelings of ethnocentricity or xenocentricity are more prevalent in U.S. culture? Why do you believe this? What issues or events might inform this?

3.2. Elements of Culture

1. What do you think of the Sapir-Whorf hypothesis? Do you agree or disagree with it? Cite examples or research to support your point of view.
2. How do you think your culture would exist if there were no such thing as a social "norm"? Do you think chaos would ensue or relative peace could be kept? Explain.

3.3. Pop Culture, Subculture, and Cultural Change

1. Identify several examples of popular culture and describe how they inform larger culture. How prevalent is the effect of these examples in your everyday life?
2. Consider some of the specific issues or concerns of your generation. Are any ideas countercultural? What subcultures have emerged from your generation? How have the issues of your generation expressed themselves culturally? How has your generation made its mark on society's collective culture?
3. What are some examples of cultural lag that are present in your life? Do you think technology affects culture positively or negatively? Explain.

3.5. Theoretical Perspectives on Culture

1. Consider a current social trend that you have witnessed, perhaps situated around family, education, transportation, or finances. For example, many veterans of the Armed Forces, after completing tours of

duty in the Middle East, are returning to college rather than entering jobs as veterans as previous generations did. Choose a sociological approach—functionalism, conflict theory, or symbolic interactionism—to describe, explain, and analyze the social issue you choose. Afterwards, determine why you chose the approach you did. Does it suit your own way of thinking? Or did it offer the best method to illuminate the social issue?

Further Research

3.1. What Is Culture?

In January 2011, a study published in the Proceedings of the National Academy of Sciences of the United States of America presented evidence indicating that the hormone oxytocin could regulate and manage instances of ethnocentrism. [PDF]: http://openstaxcollege.org/l/oxytocin

3.2. Elements of Culture

The science-fiction novel, *Babel-17*, by Samuel R. Delaney was based upon the principles of the Sapir-Whorf hypothesis. Read an excerpt from *Babel-17*: http://openstaxcollege.org/l/Babel-17

3.3. Pop Culture, Subculture, and Cultural Change

The Beats were a counterculture that birthed an entire movement of art, music, and literature—much of which is still highly regarded and studied today. The man responsible for naming the generation was Jack Kerouac; however, the man responsible for introducing the world to that generation was John Clellon Holmes, a writer often lumped in with the group. In 1952 he penned an article for the *New York Times Magazine* titled "This Is the Beat Generation." Read that article and learn more about Clellon Holmes and the Beats: http://openstaxcollege.org/l/The-Beats

Popular culture meets counterculture as Oprah Winfrey interacts with members of the Yearning for Zion cult.: http://openstaxcollege.org/l/Oprah

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Solutions to Section Quiz

1 B, | 2 D, | 3 C, | 4 A, | 5 D, | 6 A, | 7 C, | 8 A, | 9 B, | 10 C, | 11 A, | 12 A, | 13 C, | 14 A, | 15 D, | 16 B, | 17 B, | 18 C, | 19 A, | 20 B, | 21 C, [Return to Quiz]

Image Attributions

Figure 3.3. Ruth Benedict (http://en.wikipedia.org/wiki/File:Ruth_Benedict.jpg) is in the public domain (http://commons.wikimedia.org/wiki/Public_domain#Material_in_the_public_domain)

Figure 3.7. Multilingual City by Michael Gil (http://www.flickr.com/photos/13907834@N00/4414065031) used under CC-BY 2.0 license (https://creativecommons.org/licenses/by/2.0/)

Figure 3.13. Canadian nurses voting 1917 by William Rider-Rider (http://commons.wikimedia.org/wiki/File:Canadian_nurses_voting_1917.jpg) is in public domain

Long Descriptions

Figure 3.25 Long description: A young woman leans against an old-style blue bike. She wears bright clothes, large glasses, knee high socks and an owl backpack." [Return to Figure 3.25]

Figure 3.27 Long description: Betty the Beatnik with a collection of fashion choices including black, long sleeve shirts and turtlenecks, black pants, and long black dresses. [Return to Figure 3.27]

Figure 3.32 Long description: One man in an ill-fitting suit holds a sign ductaped together that says, "cobble, together, assorted software, to do music, movies and websites.'; The other man is dressed casually and holds a simple sign that says, "I come with iLife." [Return to Figure 3.32]

4

Chapter 5. Socialization



Figure 5.1. Socialization is how we learn the norms and beliefs of our society. From our earliest family and play experiences, we are made aware of societal values and expectations. (Photo courtesy of Seattle Municipal Archives/Flickr)

Learning Objectives

5.1. Theories of Self Development

- Describe the self as a social structure.
- Explain the four stages of role development in child socialization.
- Analyze the formation of a gender schema in the socialization of gender roles.

5.2. Why Socialization Matters

- Analyze the importance of socialization for individuals and society.
- Explain the nature versus nurture debate.
- Describe both the conformity of behaviour in society and the existence of individual uniqueness.

5.3. Agents of Socialization

- Learn the roles of families and peer groups in socialization.
- Understand how we are socialized through formal institutions like schools, workplaces, and the government.

5.4. Socialization Across the Life Course

- Explain how people are socialized into new roles at age-related transition points.
- Describe when and how resocialization occurs.

Introduction to Socialization



Figure 5.2. Victor, the wild boy or "feral child" of Aveyron, France grew up alone in the woods until age 12. He was only able to learn rudimentary language and social skills. Victor was the subject of the Francois Truffault film L'Enfant Sauvage (1970). (Image courtesy of Wikimedia Commons)

In the summer of 2005, police detective Mark Holste followed an investigator from the Department of Children and Families to a home in Plant City, Florida. They were there to look into a statement from the neighbour concerning a shabby house on Old Sydney Road. A small girl was reported peering from one of its broken windows. This seemed odd because no one in the neighbourhood had seen a young child in or around the home, which had been inhabited for the past three years by a woman, her boyfriend, and two adult sons.

Who Was the Mysterious Girl in the Window?

Entering the house, Detective Holste and his team were shocked. It was the worst mess they had ever seen: infested with cockroaches, smeared with feces and urine from both people and pets, and filled with dilapidated furniture and ragged window coverings.

Detective Holste headed down a hallway and entered a small room. That is where he found a little girl with big, vacant eyes staring into the darkness. A newspaper report later described the detective's first encounter with the child:

> She lay on a torn, moldy mattress on the floor. She was curled on her side … her ribs and collarbone jutted out … her black hair was matted, crawling with lice. Insect bites, rashes and sores pocked her skin…. She was naked — except for a swollen diaper.… Her name, her mother said, was Danielle. She was almost seven years old. (DeGregory, 2008)

Detective Holste immediately carried Danielle out of the home. She was taken to a hospital for medical treatment and evaluation. Through extensive testing, doctors determined that, although she was severely malnourished, Danielle was able to see, hear, and vocalize normally. Still, she would not look anyone in the eyes, did not know how to chew or swallow solid food, did not cry, did not respond to stimuli that would typically cause pain, and did not know how to communicate either with words or simple gestures such as nodding "yes" or "no." Likewise, although tests showed she had no chronic diseases or genetic abnormalities, the only way she could stand was with someone holding onto her hands, and she "walked sideways on her toes, like a crab" (DeGregory, 2008).

What had happened to Danielle? Put simply: beyond the basic requirements for survival, she had been neglected. Based

on their investigation, social workers concluded that she had been left almost entirely alone in rooms like the one where she was found. Without regular interaction—the holding, hugging, talking, the explanations and demonstrations given to most young children—she had not learned to walk or to speak, to eat or to interact, to play or even to understand the world around her. From a sociological point of view, Danielle had not had been socialized.

Socialization is the process through which people are taught to be proficient members of a society. It describes the ways that people come to understand societal norms and expectations, to accept society's beliefs, and to be aware of societal values. It also describes the way people come to be aware of themselves and to reflect on the suitability of their behaviour in their interactions with others. Socialization occurs as people engage and disengage in a series of roles throughout life. Each **role**, like the role of son or daughter, student, friend, employee, etc., is defined by the behaviour expected of a person who occupies a particular position.

Socialization is not the same as socializing (interacting with others, like family, friends, and coworkers); to be precise, it is a sociological process that occurs through socializing. As Danielle's story illustrates, even the most basic of human activities are learned. You may be surprised to know that even physical tasks like sitting, standing, and walking had not automatically developed for Danielle as she grew. Without socialization, Danielle had not learned about the material culture of her society (the tangible objects a culture uses): For example, she could not hold a spoon, bounce a ball, or use a chair for sitting. She also had not learned its nonmaterial culture, such as its beliefs, values, and norms. She had no understanding of the concept of family, did not know cultural expectations for using a bathroom for elimination, and had no sense of modesty. Most importantly, she hadn't learned to use the symbols that make up language—through which we learn about who we are, how we fit with other people, and the natural and social worlds in which we live.

In the following sections, we will examine the importance of the complex process of socialization and learn how it takes place through interaction with many individuals, groups, and social institutions. We will explore how socialization is not only critical to children as they develop, but how it is a lifelong process through which we become prepared for new social environments and expectations in every stage of our lives. But first, we will turn to scholarship about self development, the process of coming to recognize a sense of a "self" that is then able to be socialized.

5.1. Theories of Self Development

Danielle's case underlines an important point that sociologists make about socialization, namely that the human **self** does not emerge "naturally" as a process driven by biological mechanisms. What is a self? What does it mean to have a self? The self refers to a person's distinct sense of identity. It is who we are for ourselves and who we are for others. It has consistency and continuity through time and a coherence that distinguishes us as persons. However, there is something always precarious and incomplete about the self. Selves change through the different stages of life; sometimes they do not measure up to the ideals we hold for ourselves or others, and sometimes they can be wounded by our interactions with others or thrown into crisis. As Zygmunt Bauman put it, one's distinct sense of identity is a "postulated self," a "horizon towards which I strive and by which I assess, censure and correct my moves" (2004). It is clear, however, that the self does not develop in the absence of socialization. The self is a social product.

The American sociologist George Herbert Mead is often seen as the founder of the school of symbolic interactionism in sociology, although he referred to himself a social behaviourist. His conceptualization of the self has been very influential. Mead defines the emergence of the self as a thoroughly social process: "The self, as that which can be an object to itself, is essentially a social structure, and it arises in social experience" (Mead, 1934).

In this description, you should notice first that the key quality of the self that Mead is concerned with is the ability to be reflexive or self-aware (i.e., to be an "object" to oneself). One can think *about* oneself, or feel how one is feeling. Second, this key quality of the self can only arise in a social context through social interactions with others. In Charles Horton Cooley's concept of the "looking glass self," others, and their attitudes towards us, are like mirrors in which we are able to see ourselves and formulate an idea of who we are (Cooley, 1902). Without others, or without society, the self does not exist: "[I]t is impossible to conceive of a self arising outside of social experience" (Mead, 1934, p. 293).

Even when the self is alone for extended periods of time (hermits, prisoners in isolation, etc.), an internal conversation goes on that would not be possible if the individual had not been socialized already. The examples of feral children like Victor of Aveyron or children like Danielle who have been raised under conditions of extreme social deprivation attest to



Figure 5.3. "What iss he, my preciouss?" Gollum in The Hobbit lived in isolation under the Misty Mountains for 500 years. To the degree that he had a coherent self, it was because he still had a robust and ongoing internalized conversation with the ring of power, his "precious." (Image courtesy of Brenda Clarke/Flickr)

the difficulties these individuals confront when trying to develop this reflexive quality of humanity. They often cannot use language, form intimate relationships, or play games. So socialization is not simply the process through which people learn the norms and rules of a society, it also is the process by which people become aware of themselves as they interact with others. It is the process through which people are able to become people in the first place.

The necessity for early social contact was demonstrated by the research of Harry and Margaret Harlow. From 1957–1963, the Harlows conducted a series of experiments studying how rhesus monkeys, which behave a lot like people, are affected by isolation as babies. They studied monkeys raised under two types of "substitute" mothering circumstances: a mesh and wire sculpture, or a soft terry cloth "mother." The monkeys systematically preferred the company of a soft, terry cloth substitute mother (closely resembling a rhesus monkey) that was unable to feed them, to a mesh and wire mother that provided sustenance via a feeding tube. This demonstrated that while food was important, social comfort was of greater value (Harlow & Harlow, 1962; Harlow, 1971). Later experiments testing more severe isolation revealed that such deprivation of social contact led to significant developmental and social challenges later in life.

Theories of Self Development

When we are born, we have a genetic makeup and biological traits. However, who we are as human beings develops through social interaction. Many scholars, both in the fields of psychology and sociology, have described the process of self development as a precursor to understanding how that "self" becomes socialized.

Sigmund Freud

Psychoanalyst Sigmund Freud (1856–1939) was one of the most influential modern scientists to put forth a theory about how people develop a sense of **self**. He believed that personality and sexual development were closely linked, and he divided the maturation process into universal psychosexual stages: oral, anal, phallic, latency, and genital. Each stage involves the child's discovery and passage through the bodily pleasures linked to breastfeeding, toilet training, and sexual awareness (Freud, 1905).

Key to Freud's approach to child development was his emphasis on tracing the formations of desire and pleasure in a child's life. The child is seen to be at the centre of a tricky negotiation between internal, instinctual drives for gratification



Figure 5.4. Baby rhesus monkeys, like humans, need to be raised with social contact for healthy development. (Photo courtesy of Paul Asman and Jill Lenoble/Flickr)

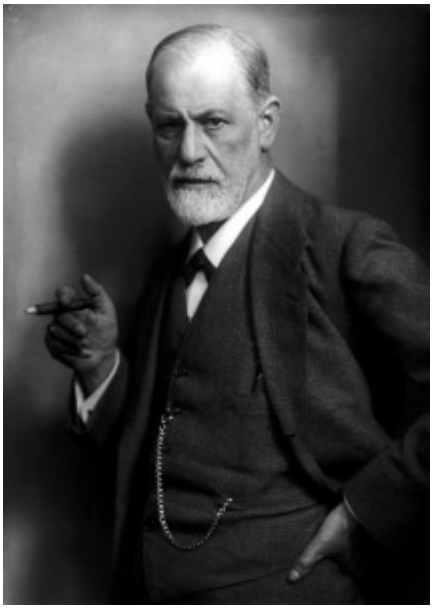


Figure 5.5. The Austrian Sigmund Freud was the founder of psychoanalysis (Photo courtesy of Wikimedia Commons)

(the pleasure principle) and external, social demands that the child repress those drives in order to conform to the rules and regulations of civilization (the reality principle). Failure to resolve the traumatic tensions and impasses of childhood psychosexual development results in emotional and psychological consequences throughout adulthood. For example, according to Freud the failure of a child to properly engage in or disengage from a specific stage of development results in predictable outcomes later in life. An adult with an oral fixation may indulge in overeating or binge drinking. An anal fixation may produce a neat freak (hence the term "anal retentive"), while a person stuck in the phallic stage may be promiscuous or emotionally immature.

Psychologist Erik Erikson (1902–1994) created a theory of personality development based on the work of Freud. However, Erikson was also interested in the social and cultural dimensions of Freud's child development schema (1963). Following Freud, he noted that each stage of psychosexual child development was associated with the formation of basic

emotional structures in adulthood. The outcome of the oral stage will determine whether someone is trustful or distrustful as an adult; the outcome of the anal stage, whether they will be confident and generous or ashamed and doubtful; the outcome of the genital stage, whether they will be full of initiative or guilt.

Erikson retained Freud's idea that the stages of child development were universal, but he believed that different cultures handled them differently. Child-raising techniques varied in line with the dominant social formation of their societies. So, for example, the tradition in the communally-based Sioux First Nation was not to wean infants but to breastfeed until the infant lost interest. This tradition created trust between the infant and his or her mother, and eventually trust between the child and the tribal group as a whole. On the other hand, modern industrial societies practice early weaning of children, which leads to a more distrustful character structure. Children develop a possessive disposition toward objects that carries with them through to adulthood. The result of early weaning is that the child is eager to get things and grab hold of things in lieu of the experience of generosity and comfort in being held.

Societies like the Sioux, in which individuals rely heavily on each other and on the group to survive in a hostile environment, will handle child training in a different manner and with different outcomes than societies based on individualism, competition, self-reliance, and self-control (Erikson, 1963).

Making Connections: Sociological Concepts

Sociology or Psychology: What's the Difference?

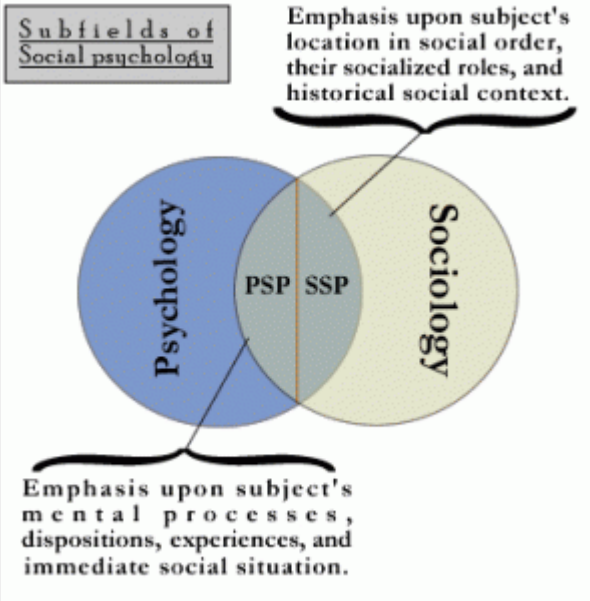


Figure 5.6. Social psychology (SP): The overlap between sociological social psychology (SSP) and psychological social psychology (PSP) [Long Description] (Image courtesy of Wikimedia Commons)

You might be wondering: If sociologists and psychologists are both interested in people and their behaviour, how are these two disciplines different? What do they agree on, and where do their ideas diverge? The answers are complicated, but the distinction is important to scholars in both fields.As a general difference, we might say that while both disciplines are interested in human behaviour, psychologists are focused on how the mind influences that behaviour, while sociologists study the role of society in shaping both behaviour and the mind. Psychologists are interested in people's mental development and how their minds process their world. Sociologists are more likely to focus on how different aspects of society contribute to an individual's relationship with the world. Another way to think of the difference is that psychologists tend to look inward to qualities of individuals (mental health, emotional processes,

cognitive processing), while sociologists tend to look outward to qualities of social context (social institutions, cultural norms, interactions with others) to understand human behaviour.

Émile Durkheim (1958–1917) was the first to make this distinction in research, when he attributed differences in suicide rates among people to social causes (religious differences) rather than to psychological causes (like their mental well-being) (Durkheim, 1897). Today, we see this same distinction. For example, a sociologist studying how a couple gets to the point of their first kiss on a date might focus her research on cultural norms for dating, social patterns of romantic activity in history, or the influence of social background on romantic partner selection. How is this process different for seniors than for teens, for example? A psychologist would more likely be interested in the person's romantic history, psychological type, or the mental processing of sexual desire.

The point that sociologists like Durkheim would make is that an analysis of individuals at the psychological level cannot adequately account for social variability of behaviours, for example, the difference in suicide rates of Catholics and Protestants, or the difference in dating scripts across cultures or historical periods. Sometimes sociology and psychology can combine in interesting ways, however. Christopher Lasch's *The Culture of Narcissism* (1979) argued that the neurotic personality was a product of an earlier Protestant ethic style of competitive capitalism; whereas, late postindustrial consumer capitalism is conducive to narcissistic personality structures (the "me" society).

Charles Horton Cooley



Figure 5.7. Do contemporary social media like Facebook present a new mode of "looking glass self" today? [Long Description] (Image courtesy of Joelle L/Fickr)

One of the pioneering contributors to sociological perspectives on self-development was the American Charles Horton Cooley (1864–1929). Cooley asserted that people's self understanding is constructed, in part, by their perception of how others view them — a process termed "the **looking glass self**" (Cooley, 1902). According to Cooley, we base our image on what we think other people see (1902). We imagine how we must appear to others, then react to this speculation. We don certain clothes, prepare our hair in a particular manner, wear makeup, use cologne, and the like — all with the notion that our presentation of ourselves is going to affect how others perceive us. We expect a certain reaction, and, if lucky, we get the one we desire and feel good about it.Cooley believed that our sense of self is not based on some internal source of individuality. Rather, we imagine how we look to others, draw conclusions based on their reactions to us, and then develop our personal sense of self. In other words, people's reactions to us are like a mirror in which we are reflected. We live a mirror image of ourselves. "The imaginations people have of one another are the solid facts of society" (Cooley, 1902).

The self or "self idea" is thoroughly social. It is not an expression of the internal essence of the individual, or of the

individual's unique psychology which emerges as the individual matures. It is based on how we imagine we appear to others. It is not how we actually appear to others but our projection of what others think or feel towards us. This projection defines how we feel about ourselves and who we feel ourselves to be. The development of a self, therefore, involves three elements in Cooley's analysis: "the imagination of our appearance to the other person; the imagination of his judgement of that appearance, and some sort of self-feeling, such as pride or mortification" (Cooley, 1902).

George Herbert Mead

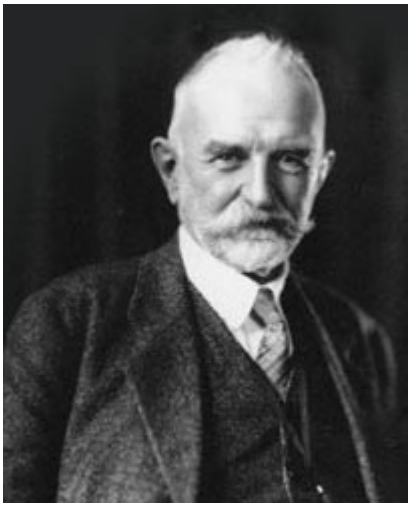


Figure 5.8. George Herbert Mead, along with Cooley, is considered the founder of the symbolic interactionist tradition in sociology (Photo courtesy of Wikimedia Commons)

Later, George Herbert Mead (1863–1931) advanced a more detailed sociological approach to the self. He agreed that the self, as a person's distinct identity, is only developed through social interaction. As we noted above, he argued that the crucial component of the self is its capacity for self reflection, its capacity to be "an object to itself" (Mead, 1934). On this basis, he broke the self down into two components or "phases," the "**I**" and the "**me**." The "me" represents the part of the self in which one recognizes the "organized sets of attitudes" of others toward the self. It is who we are in other's eyes: our roles, our "personalities," our public personas. The "I," on the other hand, represents the part of the self that acts on its own initiative or responds to the organized attitudes of others. It is the novel, spontaneous, unpredictable part of the self: the part of the self that embodies the possibility of change or undetermined action. The self is always caught up in a *social* process in which one flips back and forth between two distinguishable phases, the I and the me, as one mediates between one's own individual actions and individual responses to various social situations and the attitudes of the community.

This flipping back and forth is the condition of our being able to be social. It is not an ability that we are born with (Mead, 1934). The case of Danielle, for example, illustrates what happens when social interaction is absent from early experience: She had no ability to see herself as others would see her. From Mead's point of view, she had no "self." Without others, or without society, the self cannot exist: "[I]t is impossible to conceive of a self arising outside of social experience" (Mead, 1934).

How do we get from being newborns to being humans with "selves"? In Mead's theory of childhood development, the child develops through stages in which the child's increasing ability to play roles attests to his or her increasing solidification of a social sense of self. A **role** is the behaviour expected of a person who occupies particular social status or position in society. In learning to play roles one also learns how to put oneself in the place of another, to see through another's eyes. At one point in their life, a child simply cannot play a game like baseball; they do not "get it" because they cannot insert themselves into the complex role of the player. They cannot see themselves from the point of view of all the other players on the field or figure out their place within a rule bound sequence of activities. At another point in their life, a child becomes able to learn how to play. Mead developed a specifically sociological theory of the path of development that all

people go through by focusing on the developing capacity to put oneself in the place of another, or *role play*: the **four stages of child socialization**.

Four Stages of Child Socialization

During the **preparatory stage**, children are only capable of imitation: They have no ability to imagine how others see things. They copy the actions of people with whom they regularly interact, such as their mothers and fathers. A child's baby talk is a reflection of its inability to make an object of him- or herself. The separation of I and me does not yet exist in an organized manner to enable the child to relate to him- or herself.

This is followed by the **play stage**, during which children begin to imitate and take on roles that another person might have. Thus, children might try on a parent's point of view by acting out "grownup" behaviour, like playing dress up and acting out the mom role, or talking on a toy cell phone the way they see their father do.

> He plays that he is, for instance, offering himself something, and he buys it; he gives a letter to himself and takes it away; he addresses himself as a parent, as a teacher; he arrests himself as a policeman…. The child says something in one character and responds in another character, and then his responding in another character is a stimulus to himself in the first character, and so the conversation goes on. (Mead, 1934)

However, children are still not able to take on roles in a consistent and coherent manner. Role play is very fluid and transitory, and children flip in and out of roles easily. They "pass[..] from one role to another just as a whim takes [them]" (Mead, 1934).

During the **game stage**, children learn to consider several specific roles at the same time and how those roles interact with each other. They learn to understand interactions involving different people with a variety of purposes. They understand that role play in each situation involves following a consistent set of rules and expectations. For example, a child at this stage is likely to be aware of the different responsibilities of people in a restaurant who together make for a smooth dining experience: someone seats you, another takes your order, someone else cooks the food, while yet another person clears away dirty dishes, etc.



Figure 5.9. In the game of baseball each player "must know what everyone else is going to do in order to carry out his [or her] own play" (Mead, 1934). (Image courtesy of Public Affairs Office Fort Wainwright/Flickr).

Mead uses the example of a baseball game. "If we contrast play with the situation in an organized game, we note the essential difference that the child who plays in a game must be ready to take the attitude of everyone else involved in that game, and that these different roles must have a definite relationship to each other" (Mead, 1934). At one point in learning to play baseball, children do not get it that when they hit the ball they need to run, or that after their turn someone else gets a turn to bat. In order for baseball to work, the players not only have to know what the rules of the game are, and what their specific role in the game is (batter, catcher, first base, etc.), but know simultaneously the role of every other player on the field. They have to see the game from the perspective of others. "What he does is controlled by his being everyone else

on that team, at least in so far as those attitudes affect his own particular response" (Mead, 1934). The players have to be able to anticipate the actions of others and adjust or orient their behaviour accordingly. Role play in games like baseball involves the understanding that ones own role is tied to the roles of several people simultaneously and that these roles are governed by fixed, or at least mutually recognized, rules and expectations. Finally, children develop, understand, and learn the idea of the **generalized other**, the common behavioural expectations of general society. By this stage of development, an individual is able to internalize how he or she is viewed, not simply from the perspective of several specific others, but from the perspective of the generalized other or "organized community." Being able to guide one's actions according to the attitudes of the generalized other provides the basis of having a "self" in the sociological sense. "[O]nly in so far as he takes the attitudes of the organized social group to which he belongs toward the organized, cooperative social activity or set of such activities in which that group as such is engaged, does he develop a complete self" (Mead, 1934). This capacity defines the conditions of thinking, of language, and of society itself as the organization of complex co-operative processes and activities.

> It is in the form of the generalized other that the social process influences the behavior of the individuals involved in it and carrying it on, that is, that the community exercises control over the conduct of its individual members; for it is in this form that the social process or community enters as a determining factor into the individual's thinking. In abstract thought the individual takes the attitude of the generalized other toward himself, without reference to its expression in any particular other individuals; and in concrete thought he takes that attitude in so far as it is expressed in the attitudes toward his behavior of those other individuals with whom he is involved in the given social situation or act. But only by taking the attitude of the generalized other toward himself, in one or another of these ways, can he think at all; for only thus can thinking — or the internalized conversation of gestures which constitutes thinking-occur. And only through the taking by individuals of the attitude or attitudes of the generalized other toward themselves is the existence of a universe of discourse, as that system of common or social meanings which thinking presupposes at its context, rendered possible. (Mead, 1934)

Kohlberg's Theory of Moral Development and Gilligan's Theory of Gender Differences

Moral development is an important part of the socialization process. The term refers to the way people learn what society considered to be "good" and "bad," which is important for a smoothly functioning society. Moral development prevents people from acting on unchecked urges, instead considering what is right for society and good for others. Lawrence Kohlberg (1927–1987) was interested in how people learn to decide what is right and what is wrong. To understand this topic, he developed a theory of moral development that includes three levels: preconventional, conventional, and postconventional.

In the preconventional stage, young children, who lack a higher level of cognitive ability, experience the world around them only through their senses. It is not until the teen years that the conventional theory develops, when youngsters become increasingly aware of others' feelings and take those into consideration when determining what's good and bad. The final stage, called postconventional, is when people begin to think of morality in abstract terms, such as North Americans believing that everyone has equal rights and freedoms. At this stage, people also recognize that legality and morality do not always match up evenly (Kohlberg, 1981). When hundreds of thousands of Egyptians turned out in 2011 to protest government autocracy, they were using postconventional morality. They understood that although their government was legal, it was not morally correct.

Carol Gilligan (b. 1936), recognized that Kohlberg's theory might show gender bias since his research was conducted only on male subjects. Would female study subjects have responded differently? Would a female social scientist notice different patterns when analyzing the research? To answer the first question, she set out to study differences between how boys and girls developed morality. Gilligan's research demonstrated that boys and girls do, in fact, have different understandings of morality. Boys tend to have a justice perspective, placing emphasis on rules, laws, and individual rights. They learn to morally view the world in terms of categorization and separation. Girls, on the other hand, have a care and responsibility perspective; they are concerned with responsibilities to others and consider people's reasons behind behaviour that seems morally wrong. They learn to morally view the world in terms of connectedness.

Gilligan also recognized that Kohlberg's theory rested on the assumption that the justice perspective was the right, or

better, perspective. Gilligan, in contrast, theorized that neither perspective was "better": The two norms of justice served different purposes. Ultimately, she explained that boys are socialized for a work environment where rules make operations run smoothly, while girls are socialized for a home environment where flexibility allows for harmony in caretaking and nurturing (Gilligan, 1982, 1990).

The Socialization of Gender



Figure 5.10. Royal Style Cinderella Disney Princess (Image courtesy of Mike Mozart/Flickr)

How do girls and boys learn different gender roles? Gender differences in the ways boys and girls play and interact develop from a very early age, sometimes despite the efforts of parents to raise them in a gender neutral way. Little boys seem inevitably to enjoy running around playing with guns and projectiles, while little girls like to study the effects of different costumes on toy dolls. Peggy Orenstein (2012) describes how her two-year-old daughter happily wore her engineer outfit and took her Thomas the Tank Engine lunchbox to the first day of preschool. It only took one little boy to say to her that "*girls* don't like trains!" for her to ditch Thomas and move on to more gender "appropriate" concerns like princesses. If gender preferences are not inborn or biologically hard-wired, how do sociologists explain them?

As the Thomas the Tank Engine example suggests, **doing gender —** performing tasks based upon the gender assigned by society — is learned through interaction with others in much the same way that Mead and Cooley described for socialization in general. Children learn gender through direct feedback from others, particularly when they are censured for violating gender norms. Gender is in this sense an *accomplishment* rather than an innate trait. It takes place through the child's developing awareness of self. Whereas in the Freudian model of gender development children become aware of their own genitals and spontaneously generate erotic fantasies and speculations whose resolution lead them to identify with their mother or father, in the sociological model, it is adults' awareness of a child's genitals that leads to gender labelling, differential reinforcement and the assumption of gender roles.

From a very early age children develop a **gender schema**, a rudimentary image of gender differences, that enables them to make decisions about appropriate styles of play and behaviour (Fagot & Leinbach, 1989). As they integrate their sense of self into this developing schema, they gradually adopt consistent and stable gender roles. Consistency and stability do not mean that the gender roles that are learned are permanent, however, as would be suggested by a biological or hard-wired model of gender. Physical expressions of gender such as "throwing like a girl" can be transformed into a new stable gender schema when the little girl joins a softball league.

Fagot and Leinbach's (1986, 1989) research into the development of gender schemas showed that very young children, averaging about two years old, could not correctly classify photographs of adults and children by their gender; whereas, slightly older children, averaging 2.5 years old, could. They concluded that the younger children had not yet developed a gender schema. They also observed that the older children who could correctly classify the photos by gender demonstrated gender specific play; they tended to choose same-gender play groups and girls were less aggressive in their play. The older children were integrating their sense of self into their gender schemas and behaving accordingly.

Similarly, when they studied children at home, they found that children at age 1.5 could not assign gender to photographs correctly and did not engage in gender-typed play. However, by age 2.25 years about half of the children could classify the photos and were engaging in gender specific play. These "early labellers" were distinguished from those who could not classify photos by the way their parents interacted with them. Parents of early adopters were more likely to use differential reinforcement in the form of positive and negative responses to gender-typed toy play.

It is interesting, with respect to the difference between the Freudian and sociological models of gender socialization, that the gender schemas of young children develop with respect to external cultural signs of gender rather than biological markers of genital differences. Sandra Bem (1989) showed young children photos of either a naked child or a child dressed in boys or girls clothing. The younger children had difficulty classifying the naked photos but could classify the clothed photos. They did not have an understanding of biological sex constancy — i.e. the ability to determine sex based on anatomy regardless of gender signs — but used cultural signs of gender like clothing or hair style to determine gender. Moreover, it was the gender schema and not the recognition of anatomical differences that first determined their choice of gender-typed toys and gender-typed play groups. Bem suggested that "children who can label the sexes but do not understand anatomical stability are not yet confident that they will always remain in one gender group" (1989).

Making Connections: Sociology in the Real World

What a Pretty Little Lady!



Figure 5.11. Peggy Orenstein on "princess culture": "Within a month [of starting preschool], Daisy threw a tantrum when I tried to wrestle her into pants. As if by osmosis she had learned the names and gown colors of every Disney Princess — I didn't even know what a Disney Princess was. She gazed longingly into the tulle-draped windows of the local toy stores and for her third birthday begged for a "real princess dress" with matching plastic high heels" (Orenstein, 2012). (Image courtesy of Dave Jacquin/ Flickr)

"What a cute dress!" "I like the ribbons in your hair." "Wow, you look so pretty today." According to Lisa Bloom, author of *Think: Straight Talk for Women to Stay Smart in a Dumbed Down World*, most of us use pleasantries like these when we first meet little girls. "So what?" you might ask. Bloom asserts that we are too focused on the appearance of young girls, and as a result our society is socializing them to believe that how they look is of vital importance. Bloom may be on to something. How often do you tell a little boy how attractive his outfit is, how nice looking his shoes are, or how handsome he looks today? To support her assertions, Bloom cites, as one example, that about 50 percent of girls ages three to six worry about being fat (Bloom, 2011). We're talking about kindergarteners who are concerned about their body image. Sociologists are acutely interested in of this type of gender socialization, where societal expectations of how boys and girls should *be* — how they should behave, what toys and colours they should like, and how important

their attire is — are reinforced. One solution to this type of gender socialization is being experimented with at the Egalia preschool in Sweden, where children develop in a genderless environment. All of the children at Egalia are referred to with neutral terms like "friend" instead of he or she. Play areas and toys are consciously set up to eliminate any reinforcement of gender expectations (Haney, 2011). Egalia strives to eliminate all societal gender norms from these children's preschool world. Extreme? Perhaps. So what is the middle ground? Bloom suggests that we start with simple steps: When introduced to a young girl, ask about her favourite book or what she likes. In short, engage her mind not her outward appearance (Bloom, 2011).

5.2. Why Socialization Matters

Socialization is critical both to individuals and to the societies in which they live. It illustrates how completely intertwined human beings and their social worlds are. First, it is through teaching culture to new members that a society perpetuates itself. If new generations of a society do not learn its way of life, it ceases to exist. Whatever is distinctive about a culture must be transmitted to those who join it in order for a society to survive. For Canadian culture to continue, for example, children in Canada must learn about cultural values related to democracy: They have to learn the norms of voting, as well as how to use material objects such as a ballot. Of course, some would argue that it is just as important in Canadian culture for the younger generation to learn the etiquette of eating in a restaurant or the rituals of tailgate parties before baseball games. In fact, there are many ideas and objects that Canadians teach children in hopes of keeping the society's way of life going through another generation.



Figure 5.12. Socialization teaches us our society's expectations for dining out. The manners and customs of different cultures (When can you use your hands to eat? How should you compliment the cook? Who is the "head" of the table?) are learned through socialization. (Photo courtesy of Niyam Bhushan/Flickr)

Socialization is just as essential to us as individuals. Social interaction provides the means via which we gradually become able to see ourselves through the eyes of others, learning who we are and how we fit into the world around us. In addition, to function successfully in society, we have to learn the basics of both material and nonmaterial culture, everything from how to dress ourselves to what is suitable attire for a specific occasion; from when we sleep to what we sleep on; and from what is considered appropriate to eat for dinner to how to use the stove to prepare it. Most importantly, we have to learn language — whether it is the dominant language or one common in a subculture, whether it is verbal or through signs — in order to communicate and to think. As we saw with Danielle, without socialization we literally have no self. We are unable to function socially.

Nature versus Nurture

Some experts assert that who we are is a result of **nurture —** the relationships and caring that surround us. Others argue that who we are is based entirely in genetics. According to this belief, our temperaments, interests, and talents are set before birth. From this perspective, then, who we are depends on **nature**.



Figure 5.13. Identical twins may look alike, but their differences can give us clues to the effects of socialization. (Photo courtesy of D. Flam/Flickr)

One way that researchers attempt to prove the impact of nature is by studying twins. Some studies followed identical twins who were raised separately. The pairs shared the same genetics, but, in some cases, were socialized in different ways. Instances of this type of situation are rare, but studying the degree to which identical twins raised apart are the same or different can give researchers insight into how our temperaments, preferences, and abilities are shaped by our genetic makeup versus our social environment.

For example, in 1968, twin girls born to a mentally ill mother were put up for adoption. However, they were also separated from each other and raised in different households. The parents, and certainly the babies, did not realize they were one of five pairs of twins who were made subjects of a scientific study (Flam, 2007).

In 2003, the two women, by then age 35, were reunited. Elyse Schein and Paula Bernstein sat together in awe, feeling like they were looking into a mirror. Not only did they look alike, but they behaved alike, using the same hand gestures and facial expressions (Spratling, 2007). Studies like this point to the genetic roots of our temperament and behaviour.

On the other hand, studies of identical twins have difficulty accounting for divergences in the development of inherited diseases. In the case of schizophrenia, epidemiological studies show that there is a strong biological component to the disease. The closer our familial connection to someone with the condition, the more likely we will develop it. However, even if our identical twin develops schizophrenia we are less than 50 percent likely to develop it ourselves. Why is it not 100 percent likely? What occurs to produce the divergence between genetically identical twins (Carey, 2012)?

Though genetics and hormones play an important role in human behaviour, biological explanations of human behaviour have serious deficiencies from a sociological point of view, especially when they are used to try to explain complex aspects of human social life like homosexuality, male aggressiveness, female spatial skills, and the like. As we noted in Chapter 3, the logic of biological explanation usually involves three components: the identification of a supposedly *universal* quality or trait of human behaviour, an attribution of a *genetic* source of the behavioural trait, and an argument why this behaviour

makes it more likely that the genes that code for it will be passed successfully to descendents. The conclusion of this reasoning is that this behaviour or quality is hard-wired or difficult to change (Lewontin, 1991).

However, an argument, for example that males are naturally aggressive because of their hormonal structure or other biological mechanisms, does not take into account the huge variations in the meaning or practice of aggression between cultures, nor the huge variations in what counts as aggressive in different situations, let alone the fact that many men are not aggressive by any definition, and that men *and* women both have "male" hormones like testosterone. More interesting for the sociologist in this example is that men who are not aggressive often get called sissies. This indicates that male aggression has to do more with a normative structure within male culture than with a genetic or hormonal structure that explains aggressive behaviour.

Sociology's larger concern is the effect that society has on human behaviour, the nurture side of the nature versus nurture debate. To what degree are processes of identification and "self-fulfilling prophecy" at work in the lives of the twins Elyse Schein and Paula Bernstein? Despite growing up apart, do they share common racial, class, or religious characteristics? Aside from the environmental or epigenetic factors that lead to the divergence of twins with regard to schizophrenia, what happens to the social standing and social relationships of a person when the condition develops? What happens to schizophrenics in different societies? How does the social role of the schizophrenic integrate him or her into a society (or not)? Whatever the role of genes or biology in our lives, genes are never expressed in a vacuum. Environmental influence always matters.

Making Connections: Case Study

The Life of Chris Langan, the Smartest Man You've Never Heard Of



Figure 5.14. Christopher Michael Langan (left), stands with a relative during the 1950's, in San Francisco, CA. (Photo courtesy of Wikimedia Commons)

Bouncer. Firefighter. Factory worker. Cowboy. Chris Langan (b. 1952) has spent the majority of his adult life just getting by with jobs like these. He has no college degree, few resources, and a past filled with much disappointment. Chris Langan also has an IQ of over 195, nearly 100 points higher than the average person (Brabham, 2001). So why didn't Chris become a neurosurgeon, professor, or aeronautical engineer? According to Macolm Gladwell in his book *Outliers: The Story of Success* (2008), Chris didn't possess the set of social skills necessary to succeed on such a high level — skills that aren't innate, but learned.

Gladwell looked to a recent study conducted by sociologist Annette Lareau in which she closely shadowed 12 families from various economic backgrounds and examined their parenting techniques. Parents from lower-income families followed a strategy of "accomplishment of natural growth," which is to say they let their children develop on their own with a large amount of independence; parents from higher-income families, however, "actively fostered

and accessed a child's talents, opinions, and skills" (Gladwell, 2008). These parents were more likely to engage in analytical conversation, encourage active questioning of the establishment, and foster development of negotiation skills. The parents were also able to introduce their children to a wide range of activities, from sports to music to accelerated academic programs. When one middle class child was denied entry to a gifted and talented program, the mother petitioned the school and arranged additional testing until her daughter was admitted. Lower-income parents, however, were more likely to unquestioningly obey authorities such as school boards. Their children were not being socialized to comfortably confront the system and speak up (Gladwell, 2008).

What does this have to do with Chris Langan, deemed by some as the smartest man in the world (Brabham, 2001)? Chris was born in severe poverty, and he was moved across the country with an abusive and alcoholic stepfather. Chris's genius went greatly unnoticed. After accepting a full scholarship to Reed College, his funding was revoked after his mother failed to fill out necessary paperwork. Unable to successfully make his case to the administration, Chris, who had received straight A's the previous semester, was given F's on his transcript and forced to drop out. After enrolling in Montana State University, an administrator's refusal to rearrange his class schedule left him unable to find the means necessary to travel the 16 miles to attend classes. What Chris has in brilliance, he lacks in practical intelligence, or what psychologist Robert Sternberg defines as "knowing what to say to whom, knowing when to say it, and knowing how to say it for maximum effect" (Sternberg et al., 2000). Such knowledge was never part of his socialization.

Chris gave up on school and began working an array of blue-collar jobs, pursuing his intellectual interests on the side. Though he's recently garnered attention from work on his "Cognitive Theoretic Model of the Universe," he remains weary and resistant of the educational system.

As Gladwell concluded, "He'd had to make his way alone, and no one—not rock stars, not professional athletes, not software billionaires, and not even geniuses—ever makes it alone" (2008).

Individual and Society

How do sociologists explain both the conformity of behaviour in society and the existence of individual uniqueness? The concept of socialization raises a classic problem of sociological analysis: the problem of agency. How is it possible for there to be individual differences, individual choice, or individuality at all if human development is about assuming socially defined roles? How can an individual have **agency**, the ability to choose and act independently of external constraints? Since Western society places such value on individuality, in being oneself or in resisting peer pressure and other pressures to conform, the question of where society ends and where the individual begins often is foremost in the minds of students of sociology. Numerous debates in the discipline focus on this question.

However, from the point of view emphasized in this chapter, it is a false question. As noted previously, for Mead the individual "agent" already is a "social structure." No separation exists between the individual and society; the individual is thoroughly social from the inside out and vice versa.

Mead addressed the question of agency at the level of the relationship between the "I" and the "me" as two "phases" that flip back and forth in the life of the self. The "me" is the part of the self in which one recognizes and assumes the expectations or "organized sets of attitudes" of others: our social roles, our designations, our personalities (as they appear to others), and so on. On the basis of the "me" the individual knows what is expected of him or her in a social situation and what the consequences of an action will be. The "I" represents the part of the self which acts or responds to the organized attitudes of others. It is, however, the unpredictable part of the self which embodies the principles of novelty, spontaneity, freedom, initiative (and the possibility of change) in social action because we can never be sure in advance how we will act, nor be certain of the outcome of our actions. "Exactly how we will act never gets into experience until after the action takes place" (Mead, 1934). Both phases are thoroughly social — the individual only ever experiences him- or herself "indirectly" from the standpoint of others — but without the two phases "there could be no conscious responsibility, and there would be nothing novel in experience" (Mead, 1934).

In a similar manner, sociologists argue that individuals vary because the social environments to which they adapt vary. The socialization process occurs in different social environments — i.e., environments made up of the responses of others — each of which impose distinctive and unique requirements. In one family, children are permitted unlimited access to TV and video games; in another, there are no TV or video games, for example. When they are growing up, children adapt

and develop different strategies of play and recreation. Their parents and others respond to the child's choices, either by reinforcing them or encouraging different choices. Along a whole range of social environmental differences and responses, support and resistance, children gradually develop stable and consistent orientations to world, each to some degree unique because each is formed from the vantage point unique to the place in society the child occupies. Individual variation and individual agency are possible because society itself varies in each social situation. Indeed, the configuration of society itself differs according to each individual's contribution to each social situation.

Sociologists all recognize the importance of socialization for healthy individual and societal development. But how do scholars working in the three major theoretical paradigms approach this topic? Structural functionalists would say that socialization is essential to society, both because it trains members to operate successfully within it and because it perpetuates culture by transmitting it to new generations. Individuals learn and assume different social roles as they age. The roles come with relatively fixed norms and social expectations attached, which allow for predictable interactions between people, but how the individual lives and balances their roles is subject to variation. A critical sociologist might argue that socialization reproduces inequality from generation to generation by conveying different expectations and norms to those with different social characteristics. For example, individuals are socialized with different expectations about their place in society according to their gender, social class, and race. As in the life of Chris Langan, this creates different and unequal opportunities and, therefore, differences between unique individuals. A symbolic interactionist studying socialization is concerned with face-to-face exchanges and symbolic communication. For example, dressing baby boys in blue and baby girls in pink is one small way that messages are conveyed about differences in gender roles. For the symbolic interactionist, though, how these messages are formulated and how they are interpreted are always situational, always renewed, and defined by the specific situations in which the communication occurs.

5.3. Agents of Socialization

Socialization helps people learn to function successfully in their social worlds. How does the process of socialization occur? How do we learn to use the objects of our society's material culture? How do we come to adopt the beliefs, values, and norms that represent its nonmaterial culture? This learning takes place through interaction with various agents of socialization, like peer groups and families, plus both formal and informal social institutions.

Social Group Agents

Social groups often provide the first experiences of socialization. Families, and later peer groups, communicate expectations and reinforce norms. People first learn to use the tangible objects of material culture in these settings, as well as being introduced to the beliefs and values of society.

Family

Family is the first agent of socialization. Mothers and fathers, siblings and grandparents, plus members of an extended family all teach a child what he or she needs to know. For example, they show the child how to use objects (such as clothes, computers, eating utensils, books, bikes); how to relate to others (some as "family," others as "friends," still others as "strangers" or "teachers" or "neighbours"); and how the world works (what is "real" and what is "imagined"). As you are aware, either from your own experience as a child or your role in helping to raise one, socialization involves teaching and learning about an unending array of objects and ideas.

It is important to keep in mind, however, that families do not socialize children in a vacuum. Many social factors impact how a family raises its children. For example, we can use sociological imagination to recognize that individual behaviours are affected by the historical period in which they take place. Sixty years ago, it would not have been considered especially strict for a father to hit his son with a wooden spoon or a belt if the child misbehaved, but today that same action might be considered child abuse.

Sociologists recognize that race, social class, religion, and other societal factors play an important role in socialization. For example, poor families usually emphasize obedience and conformity when raising their children, while wealthy families emphasize judgment and creativity (National Opinion Research Center, 2008). This may be because working-class parents have less education and more repetitive-task jobs for which the ability to follow rules and to conform helps. Wealthy parents tend to have better education and often work in managerial positions or in careers that require creative problem

solving, so they teach their children behaviours that would be beneficial in these positions. This means that children are effectively socialized and raised to take the types of jobs that their parents already have, thus reproducing the class system (Kohn, 1977). Likewise, children are socialized to abide by gender norms, perceptions of race, and class-related behaviours.

In Sweden, for instance, stay-at-home fathers are an accepted part of the social landscape. A government policy provides subsidized time off work — 68 weeks for families with newborns at 80 percent of regular earnings — with the option of 52 of those weeks of paid leave being shared between both mothers and fathers, and eight weeks each in addition allocated for the father and the mother. This encourages fathers to spend at least eight weeks at home with their newborns (Marshall, 2008). As one stay-at-home dad said, being home to take care of his baby son "is a real fatherly thing to do. I think that's very masculine" (Associated Press, 2011). Overall, 90 percent of Swedish men participate in the paid leave program.

In Canada on the other hand, outside of Quebec, parents can share 35 weeks of paid parental leave at 55 percent of their regular earnings. Only 10 percent of men participate. In Quebec, however, where in addition to 32 weeks of shared parental leave, men also receive five weeks of paid leave, the participation rate of men is 48 percent. In Canada overall, the participation of men in paid parental leave increased from 3 percent in 2000 to 20 percent in 2006 because of the change in law in 2001 that extended the number of combined paid weeks parents could take. Researchers note that a father's involvement in child raising has a positive effect on the parents' relationship, the father's personal growth, and the social, emotional, physical, and cognitive development of children (Marshall, 2008). How will this effect differ in Sweden and Canada as a result of the different nature of their paternal leave policies?



Figure 5.15. The socialized roles of dads and moms vary by society. (Photo courtesy of Nate Grigg/Flickr)

Peer Groups

A peer group is made up of people who are not necessarily friends but who are similar in age and social status and who share interests. Peer group socialization begins in the earliest years, such as when kids on a playground teach younger children the norms about taking turns or the rules of a game or how to shoot a basket. As children grow into teenagers, this process continues. Peer groups are important to adolescents in a new way, as they begin to develop an identity separate from their parents and exert independence. This is often a period of parental-child conflict and rebellion as parental values come into conflict with those of youth peer groups. Peer groups provide their own opportunities for socialization since kids usually engage in different types of activities with their peers than they do with their families. Peer groups provide adolescents' first major socialization experience outside the realm of their families. They are especially influential, therefore, with respect to preferences in music, style, clothing, etc., sharing common social activities, and learning to engage in romantic relationships. With peers, adolescents experiment with new experiences outside the control of parents: sexual relationships, drug and alcohol use, political stances, hair and clothing choices, and so forth. Interestingly, studies have shown that although friendships rank high in adolescents' priorities, this is balanced by parental influence.

Conflict between parents and teenagers is usually temporary and in the end families exert more influence than peers over educational choices and political, social, and religious attitudes.

Peer groups might be the source of rebellious youth culture, but they can also be understood as agents of social integration. The seemingly spontaneous way that youth in and out of school divide themselves into cliques with varying degrees of status or popularity prepares them for the way the adult world is divided into status groups. The racial characteristics, gender characteristics, intelligence characteristics, and wealth characteristics that lead to being accepted in more or less popular cliques in school are the same characteristics that divide people into status groups in adulthood.

Institutional Agents

The social institutions of our culture also inform our socialization. Formal institutions — like schools, workplaces, and the government — teach people how to behave in and navigate these systems. Other institutions, like the media, contribute to socialization by inundating us with messages about norms and expectations.

School

Most Canadian children spend about seven hours a day and 180 days a year in school, which makes it hard to deny the importance school has on their socialization. In elementary and junior high, compulsory education amounts to over 8,000 hours in the classroom (OECD, 2013). Students are not only in school to study math, reading, science, and other subjects — the manifest function of this system. Schools also serve a latent function in society by socializing children into behaviours like teamwork, following a schedule, and using textbooks.



Figure 5.16. These kindergarteners are not just learning to read and write; they are being socialized to norms like keeping their hands to themselves, standing in line, and singing the national anthem. (Photo courtesy of Bonner Springs Library/Flickr)

School and classroom rituals, led by teachers serving as role models and leaders, regularly reinforce what society expects from children. Sociologists describe this aspect of schools as the **hidden curriculum**, the informal teaching done by schools.

For example, in North America, schools have built a sense of competition into the way grades are awarded and the way teachers evaluate students. Students learn to evaluate themselves within a hierarchical system of A, B, C, etc. students (Bowles & Gintis, 1976). However, different lessons can be taught by different instructional techniques. When children participate in a relay race or a math contest, they learn that there are winners and losers in society. When children are required to work together on a project, they practice teamwork with other people in cooperative situations. Bowles and Gintis argue that the hidden curriculum prepares children for a life of conformity in the adult world. Children learn how to deal with bureaucracy, rules, expectations, to wait their turn, and to sit still for hours during the day. The latent functions of competition, teamwork, classroom discipline, time awareness, and dealing with bureaucracy are features of the hidden curriculum.

Schools also socialize children by teaching them overtly about citizenship and nationalism. In the United States, children are taught to say the Pledge of Allegiance. Most school districts require classes about U.S. history and geography. In Canada, on the other hand, critics complain that students do not learn enough about national history, which undermines the development of a sense of shared national identity (Granatstein, 1998). Textbooks in Canada are also continually scrutinized and revised to update attitudes toward the different cultures in Canada as well as perspectives on historical events; thus, children are socialized to a different national or world history than earlier textbooks may have done. For example, recent textbook editions include information about the mistreatment of First Nations which more accurately reflects those events than in textbooks of the past. In this regard, schools educate students explicitly about aspects of citizenship important for being able to participate in a modern, heterogeneous culture.

Making Connections: Sociology in the Real World

Controversial Textbooks



Figure 5.17. 1809 map of Korea and Japan by Edinburgh cartographer John Pinkerton. (Courtesy of Geographicus Rare Antique Maps/Wikimedia Commons).

On August 13, 2001, 20 South Korean men gathered in Seoul. Each chopped off one of his own fingers because of textbooks. These men took drastic measures to protest eight middle school textbooks approved by Tokyo for use in Japanese middle schools. According to the Korean government (and other East Asian nations), the textbooks glossed over negative events in Japan's history at the expense of other Asian countries (The Telegraph, 2001).

In the early 1900s, Japan was one of Asia's more aggressive nations. Korea was held as a colony by the Japanese between 1910 and 1945. Today, Koreans argue that the Japanese are whitewashing that colonial history through

these textbooks. One major criticism is that they do not mention that, during World War II, the Japanese forced Korean women into sexual slavery. The textbooks describe the women as having been "drafted" to work, a euphemism that downplays the brutality of what actually occurred. Some Japanese textbooks dismiss an important Korean independence demonstration in 1919 as a "riot." In reality, Japanese soldiers attacked peaceful demonstrators, leaving roughly 6,000 dead and 15,000 wounded (Crampton, 2002).

Although it may seem extreme that these people were so enraged about how events are described in a textbook that they would resort to dismemberment, the protest affirms that textbooks are a significant tool of socialization in state-run education systems.

The Workplace

Just as children spend much of their day at school, most Canadian adults at some point invest a significant amount of time at a place of employment. Although socialized into their culture since birth, workers require new socialization into a workplace both in terms of material culture (such as how to operate the copy machine) and nonmaterial culture (such as whether it is okay to speak directly to the boss or how the refrigerator is shared).

Different jobs require different types of socialization. In the past, many people worked a single job until retirement. Today, the trend is to switch jobs at least once a decade. Between the ages of 18 and 44, the average baby boomer of the younger set held 11 different jobs (U.S. Bureau of Labor Statistics, 2010). This means that people must become socialized to, and socialized by, a variety of work environments.

Religion

While some religions may tend toward being an informal institution, this section focuses on practices related to formal institutions. Religion is an important avenue of socialization for many people. Canada is full of synagogues, temples, churches, mosques, and similar religious communities where people gather to worship and learn. Like other institutions, these places teach participants how to interact with the religion's material culture (like a mezuzah, a prayer rug, or a communion wafer). For some people, important ceremonies related to family structure — like marriage and birth — are connected to religious celebrations. Many of these institutions uphold gender norms and contribute to their enforcement through socialization. From ceremonial rites of passage that reinforce the family unit, to power dynamics which reinforce gender roles, religion fosters a shared set of socialized values that are passed on through society.

Making Connections: Sociology in the Real World

Girls and Movies

Pixar is one of the largest producers of children's movies in the world and has released large box office draws, such as *Toy Story*, *Cars*, *The Incredibles*, and *Up*. What Pixar has never before produced is a movie with a female lead role. This changed with Pixar's movie *Brave* in 2012. Before *Brave*, women in Pixar served as supporting characters and love interests. In *Up*, for example, the only human female character dies within the first ten minutes of the film. For the millions of girls watching Pixar films, there are few strong characters or roles for them to relate to. If they do not see possible versions of themselves, they may come to view women as secondary to the lives of men.

The animated films of Pixar's parent company, Disney, have many female lead roles. Disney is well known for films with female leads, such as *Snow White*, *Cinderella*, *The Little Mermaid*, and *Mulan*. Many of Disney's movies star a female, and she is nearly always a princess figure. If she is not a princess to begin with, she typically ends the movie by marrying a prince or, in the case of Mulan, a military general. Although not all "princesses" in Disney movies play a passive role relative to male characters, they typically find themselves needing to be rescued by a man, and the happy ending they all search for includes marriage.

Alongside this prevalence of princesses, many parents express concern about the culture of princesses that Disney has created. Peggy Orenstein addresses this problem in her popular book, *Cinderella Ate My Daughter*. Orenstein wonders



Figure 5.18. Some people are concerned about the way girls today are socialized into a "princess culture." (Photo courtesy of Emily Stanchfield/Flickr)

why every little girl is expected to be a "princess" and why pink has become an all-consuming obsession for many young girls. Another mother wondered what she did wrong when her three-year-old daughter refused to do "non-princessy" things, including running and jumping. The effects of this princess culture can have negative consequences for girls throughout life. An early emphasis on beauty and sexiness can lead to eating disorders, low self-esteem, and risky sexual behaviour among older girls.

What should we expect from Pixar's *Brave*, the company's first film to star a female character? Although *Brave* features a female lead, she is still a princess. Will this film offer any new type of role model for young girls? (Barnes, 2010; O'Connor, 2011; Rose, 2011).

Government

Although we do not think about it, many of the rites of passage people go through today are based on age norms established by the government. To be defined as an "adult" usually means being 18 years old, the age at which a person becomes legally responsible for themselves. And 65 is the start of "old age" since most people become eligible for senior benefits at that point.

Each time we embark on one of these new categories — adult, taxpayer, senior — we must be socialized into this new role. Seniors, for example, must learn the ropes of obtaining pension benefits. This government program marks the points at which we require socialization into a new category.

Mass Media

Mass media refers to the distribution of impersonal information to a wide audience via television, newspapers, radio, and the internet. With the average person spending over four hours a day in front of the TV (and children averaging even more screen time), media greatly influences social norms (Roberts, Foehr, & Rideout, 2005; Oliveira, 2013). Statistics Canada reports that for the sample of people they surveyed about their time use in 2010, 73 percent said they watched 2 hours 52 minutes of television on a given day (see the Participants column in Table 5.1 below). Television continues to be the mass medium that occupies the most free time of the average Canadian, but the internet has become the fastest growing mass medium. In the Statistics Canada survey, television use on a given day declined from 77 percent to 73 percent between 1998 and 2010, but computer use increased amongst all age groups from 5 percent to 24 percent and averaged 1 hour 23 minutes on any given day. People who played video games doubled from 3 percent to 6 percent between 1998 and 2010, and the average daily use increased from 1 hour 48 minutes to 2 hours 20 minutes (Statistics

Canada, 2013). People learn about objects of material culture (like new technology, transportation, and consumer options), as well as nonmaterial culture—what is true (beliefs), what is important (values), and what is expected (norms).

Table 5.1. Average time per day spent on various activities for participants aged 15 and over, grouped by sex, Canada, 2010

[Skip Table]

	Population			Participants			Participation rate		
Activity group	**Total**	**Male**	**Female**	**Total**	**Male**	**Female**	**Total**	**Male**	**Female**
	hours and minutes			**hours and minutes**			**percentage**		
1. Television, reading, and other passive leisure	**02:29**	**02:39**	**02:20**	**03:08**	**03:19**	**02:58**	**79**	**80**	**79**
Watching television	02:06	02:17	01:55	02:52	03:03	02:41	73	75	71
Reading books, magazines, newspapers	00:20	00:18	00:23	01:26	01:29	01:25	24	20	27
Other passive leisure	00:03	00:03	00:02	01:04	01:16	00:52	4	4	4
2. Active leisure	**01:13**	**01:27**	**00:59**	**02:22**	**02:42**	**02:01**	**51**	**54**	**49**
Active sports	00:30	00:37	00:23	01:54	02:12	01:34	26	28	25
Computer use	00:20	00:23	00:17	01:23	01:32	01:14	24	25	23
Video games	00:09	00:14	00:04	02:20	02:40	01:38	6	9	4
Other active leisure	00:14	00:13	00:15	02:05	02:06	02:04	11	10	12

Note: Average time spent is the average over a 7-day week.
Source: Statistics Canada, General Social Survey, 2010 (Statistics Canada, 2011). Note: this survey asked approximately 15,400 Canadians aged 15 and over to report in a daily journal details of the time they spent on various activities on a given day. Because they were reporting about a given day, the figures sited about the average use of television and other media differ from reports provided by BBM and other groups on the average weekly usage, like the figure of 4 hours per day of TV cited in Roberts, Foehr, and Rideout (2005) above.

5.4. Socialization Across the Life Course

Socialization isn't a one-time or even a short-term event. We are not stamped by some socialization machine as we move along a conveyor belt and thereby socialized once and for all. In fact, socialization is a lifelong process. Human development is not simply a product of the biological changes of physical maturation or the cognitive changes of psychological development, but follows a pattern of engaging and disengaging from a succession of roles that does not end with childhood but continues through the course of our lives.

In Canada, socialization throughout the life course is determined greatly by age norms and "time-related rules and regulations" (Setterson, 2002). As we grow older, we encounter age-related transition points that require socialization into a new role, such as becoming school age, entering the workforce, or retiring. At each point in life, as an individual sheds previous roles and assumes new ones, institutions or situations are involved, which requires both learning and revising one's self-definition: You are no longer living at home; you have a job! You are no longer a child; you in the army! You are no longer single; you are going to have a child! You are no longer free; you are going to jail! You are no longer in mid-life; it is time to retire!

Many of life's social expectations are made clear and enforced on a cultural level. Through interacting with others and watching others interact, the expectation to fulfill roles becomes clear. While in elementary or middle school, the prospect of having a boyfriend or girlfriend may have been considered undesirable. The socialization that takes place in high school changes the expectation. By observing the excitement and importance attached to dating and relationships within the high school social scene, it quickly becomes apparent that one is now expected not only to be a child and a student, but a significant other as well.

Adolescence in general is a period stretching from puberty to about 18 years old, characterized by the role adjustment from childhood to adulthood. It is a stage of development in which the self is redefined through a more or less arduous

process of "socialized anxiety" (Davis, 1944), re-examination and reorientation. As Jean Piaget described it, adolescence is a "decisive turning point … at which the individual rejects, or at least revises his estimate of everything that has been inculcated in him, and acquires a personal point of view and a personal place in life" (1947). It involves a fundamental "growth process" according to Edgar Friedenberg "to define the self through the clarification of experience and to establish self esteem" (1959).

Making Connections: Sociology in the Real World

Gap Year: How Different Societies Socialize Young Adults



Figure 5.19. Prince William, who took a gap year after secondary school. (Photo courtesy of Alexandre Goulet/Wikimedia Commons)

Have you ever heard of a gap year? It's a common custom in British society. When teens finish their secondary schooling (i.e., high school), they often take a year "off" before entering college. Frequently, they might take a job, travel, or find other ways to experience another culture. Prince William, the Duke of Cambridge, spent his gap year practising survival skills in Belize, teaching English in Chile, and working on a dairy farm in the United Kingdom (Prince of Wales, 2012a). His brother, Prince Harry, advocated for AIDS orphans in Africa and worked as a jackeroo (a novice ranch hand) in Australia (Prince of Wales, 2012b).

In Canada, this life transition point is socialized quite differently, and taking a year off is generally frowned upon. Instead, Canadian youth are encouraged to pick career paths by their mid-teens, to select a university or college and a major by their late teens, and to have completed all university schooling or technical training for their career by their early 20s.

In other nations, this phase of the life course is tied into conscription, a term that describes compulsory military service. Egypt, Austria, Switzerland, Turkey, and Singapore all have this system in place. Youth in these nations (often only males) are expected to undergo a number of months or years of military training and service.

How might your life be different if you lived in one of these countries? Can you think of similar social norms — related to life age-transition points — that vary from country to country?

In some cultures, adolescence is marked and ritualized through a clear **rite of passage,** a ritual that marks a life cycle transition from a previous status to a new status. Wade Davis described the rite of passage of Algonquin boys of northeastern North America when they hit puberty: Traditionally, the boys were isolated from the rest of the tribe in longhouses for two or three weeks and consumed nothing but a hallucinogenic plant from the *datura* family (1985). During

the long disorienting period of intoxication brought on by the plant the boys would forget what it meant to be a child and learn what it was to be a man.

In modern North American society, the rites of passage are not so clear cut or socially recognized. Already in 1959, Friedenberg argued that the process was hindered because of the pervasiveness of mass media that interfered with the expression of individuality crucial to this stage of life. Nevertheless, North American adolescence provided a similar trial by fire entry into adulthood: "The juvenile era provides the solid earth of life; the security of having stood up for yourself in a tough and tricky situation; the comparative immunity of knowing for yourself just exactly how the actions that must not be mentioned feel…the calm gained from having survived among comrades, that makes one ready to have friends" (Friedenberg, 1959).

Graduation from formal education — high school, vocational school, or college — involves a formal, ceremonial rite of passage yet again and socialization into a new set of expectations. Educational expectations vary not only from culture to culture, but from social class to social class. While middle- or upper-class families may expect their daughter or son to attend a four-year university after graduating from high school, other families may expect their child to immediately begin working full-time, as others within their family may have done before them.

In the process of socialization, adulthood brings a new set of challenges and expectations, as well as new roles to fill. As the aging process moves forward, social roles continue to evolve. Pleasures of youth, such as wild nights out and serial dating, become less acceptable in the eyes of society. Responsibility and commitment are emphasized as pillars of adulthood, and men and women are expected to "settle down." During this period, many people enter into marriage or a civil union, bring children into their families, and focus on a career path. They become partners or parents instead of students or significant others. Just as young children pretend to be doctors or lawyers, play house, and dress up, adults also engage **anticipatory socialization**, the preparation for future life roles. Examples would include a couple who cohabitate before marriage, or soon-to-be parents who read infant care books and prepare their home for the new arrival. University students volunteer, take internships, or enter co-op programs to get a taste for work in their chosen careers. As part of anticipatory socialization, adults who are financially able begin planning for their retirement, saving money, and looking into future health care options. The transition into any new life role, despite the social structure that supports it, can be difficult.

Socialization is ongoing throughout adulthood in another sense as well. The study of contemporary society reveals an increasing fluidity of roles, as opposed to previous eras when one could expect to be married only once, live in one location, or to have a single career. This experience is part of what Zygmunt Bauman has called **liquid modernity**, "a society in which the conditions under which its members act change faster than it takes the ways of acting to consolidate into habits and routines" (2005). As opposed to previous eras when one could expect to have a predictable sequence of role transitions — from school to work to retirement, from single to married to parenting to empty nest, etc. — the expectation today is that the individual will experience an increasing fluidity of roles. It is more difficult to view socialization as a smooth and uninterrupted process. Rather, life is increasingly fragmented, "cut into a succession of ill-connected episodes" (Bauman, 2004). As a result, social identities have become more flexible, more adaptable to unpredictable transitions, more open to taking on new roles or picking and choosing from a globalized palette of cultural values and practices.

Bauman observes that this has lead to a new basis of calculation when it comes to passing through the stages of transition in the adult life cycle. In the absence of any clear, permanent, institutional structures of continuity and stable transition through the life course, people are thrown back on themselves to provide their own continuity. Jobs disappear overnight, marriages end, friends and family move, and online communities emerge. Under these circumstances each life choice is regarded as temporary and provisional and, thereby, it involves a calculated trade off between maximizing flexibility or commitment. It is a risk to put all one's eggs in one basket. The individual has to continually decide "which one of the alternative identities to select and how long to hold on to it once the choice has been made?" (Bauman, 2004). Therefore, individuals enter jobs with an eye to their exit strategy, seizing opportunities to continually retrain, upgrade skills, and make contacts to be prepared for a better job to show up. They enter into amorous relationships on the basis of what Bauman calls "confluent love:" "a relationship that lasts only as long as, and not a moment longer than, the satisfaction it brings to both partners" (2004). In love, dumping the partner is a normal event to be planned for. They cultivate a wider network of "weak ties" rather than committing to deep friendships.

Making Connections: Sociology in the Real World

The Long Road to Adulthood for Millennials



Figure 5.20. Generation Y. (Image courtesy of Patrick Marione/Flickr)

Millennials, sometimes also called Gen Y, is a term that describes the generation born during the early 1980s to early 1990s. They are the generation that is currently between the ages of 18 and 33. While the recession was in full swing, many were in the process of entering, attending, or graduating from high school and college. With employment prospects at historical lows, large numbers of graduates were unable to find work, sometimes moving back in with their parents and struggling to pay back student loans.

According to *The New York Times*, this economic stall is causing the Millennials to postpone what most North Americans consider to be adulthood: "The traditional cycle seems to have gone off course, as young people remain untethered to romantic partners or to permanent homes, going back to school for lack of better options, traveling, avoiding commitments, competing ferociously for unpaid internships or temporary … jobs, forestalling the beginning of adult life" (Henig, 2010).

In Canada:

- 30 percent of Millennials find it difficult to support themselves on their low wages
- 44 percent find it difficult to pay for their education
- 38 percent are strapped by loan payments
- 51 percent still live with their parents
- 90 percent feel overwhelmed and experience excessive stress (Tsintziras, 2013)

The five milestones, Henig writes, that define adulthood, are "completing school, leaving home, becoming financially independent, marrying, and having a child" (2010). These social milestones are taking longer for Millennials to attain, if they are attained at all. Sociologists wonder what long-term impact this generation's situation may have on society as a whole. It is possible that adulthood will need to be redefined with new milestones. Meanwhile, preliminary survey research on Generation Z, born after 2000, suggests that these children of the post-boomer Generation X are both completely fluent in digital technology and raised to be more self-reliant. It is also estimated that for each Generation Z member to enter the workforce, three baby boomers will be retiring. However, the world they confront

is characterized by monumental global risks such as climate change, geopolitical insecurity and increasing inequality (Bland, 2016).

Resocialization

In the process of **resocialization**, old behaviours that were helpful in a previous role are removed because they are no longer of use. Resocialization is necessary when a person moves to a senior care centre, goes to boarding school, or serves time in jail. In the new environment, the old rules no longer apply. The process of resocialization is typically more stressful than normal socialization because people have to unlearn behaviours that have become customary to them.

The most common way resocialization occurs is in a **total institution** where people are isolated from society and are forced to follow someone else's rules. A ship at sea is a total institution, as are religious convents, asylums, prisons, or some cult organizations. They are places cut off from a larger society. The 15,000 Canadians who lived in federal prisons or penitentiaries at the end of 2012 are also members of a total institution (Sapers, 2013). As another example, every branch of the military is a total institution.



Figure 5.21. In basic training, soldiers are taught to walk, move, and look like each other (Photo courtesy of Staff Sergeant Desiree N. Palacios, U.S. Air Force/Wikimedia Commons)

Many individuals are resocialized into an institution through a two-part process. First, members entering an institution must leave behind their old identity through what is known as a degradation ceremony. In a **degradation ceremony**, new members lose the aspects of their old identity and are given new identities. The process is sometimes gentle. To enter a senior care home, an elderly person often must leave a family home and give up many belongings which were part of his or her long-standing identity. Though caretakers guide the elderly compassionately, the process can still be one of loss. In many cults, this process is also gentle and happens in an environment of support and caring.

In other situations, the degradation ceremony can be more extreme. Erving Goffman referred to the process of being stripped of ones external identity as a "mortification of the self" (1961). New prisoners lose freedom, rights (including the right to privacy), and personal belongings. When entering the army, soldiers have their hair cut short. Their old clothes are removed and they wear matching uniforms. These individuals must give up any markers of their former identity in order to be resocialized into an identity as a soldier.

After new members of an institution are stripped of their old identity, they build a new one that matches the new society. In the military, soldiers go through basic training together, where they learn new rules and bond with one another. They follow structured schedules set by their leaders. Soldiers must keep their areas clean for inspection, march in correct formations, and salute when in the presence of superior officers.



Figure 5.22. Riverview mental hospital, Port Coquitlam, B.C. (Image courtesy of Niall Williams/Flickr)

In *Asylum* (1961), Goffman provides an acute analysis of some of the perverse implications of resocialization within the structure of total institutions. In institutions of resocialization, inmates pass through a standard sequence of changes with respect to how their capacity to act "morally" (i.e., as someone answerable for their actions) is established, recognized, and affirmed by others (and by themselves), which Goffman refers to as their **moral career**. Goffman observed that the strategems for securing recognition of viable selfhood or moral capacity from others — mental patients from ward staff, for example — often undermined the stated goals of rehabilitation. As it was the psychiatric authorities who decided who had viable selfhood and who did not, and as tangible benefits of status and privileges were at stake, the setting of the mental institution provided the conditions under which *amoral strategies* of self became effective. Patients found that "it is not very practicable to sustain solid claims about oneself" because these were easily torn down by staff after glancing at the patients records (Goffman, 1961). Instead it was easier give up the goal of "moral" rehabilitation and just mimic what the staff wanted to get privileges.

> Learning to live under conditions of imminent exposure and wide fluctuation in regard, with little control over the granting or withholding of this regard, is an important step in the socialization of the patient, a step that tells something important about what it is like to be an inmate in a mental hospital. Having one's past mistakes and present progress under constant moral review seems to make for a special adaptation consisting of a less than moral attitude to ego ideals. One's shortcomings and successes become too central and fluctuating an issue in life to allow the usual commitment of concern for other persons' views of them. It is not very practicable to try to sustain solid claims about oneself. The inmate tends to learn that degradations and reconstructions of the self need not be given too much weight, at the same time learning that staff and inmates are ready to view an inflation or deflation of a self with some indifference. He learns that a defensible picture of self can be seen as something outside oneself that can be constructed, lost, and rebuilt, all with great speed and some equanimity. He learns about the viability of taking up a standpoint — and hence a self — that is outside the one which the hospital can give and take away from him.
>
> The setting, then, seems to engender a kind of cosmopolitan sophistication, a kind of civic apathy. In this unserious yet oddly exaggerated moral context, building up a self or having it destroyed becomes something of a shameless game, and learning to view this process as a game seems to make for some demoralization, the game being such a fundamental one. In the hospital, then, the inmate can learn that the self is not a fortress, but rather a small open city; he can become weary of having to show pleasures when held by troops of his own, and weary of how to show displeasure when held by the enemy. Once he learns what it is like to be defined by society as not having a viable self, this threatens definition — the threat that helps attach to the self society accords them — is weakened. The patient seems to gain a new plateau when he learns that he can survive while acting in a way that society sees as destructive of him. (Goffman, 1961)

Learning to deal with life after having lived in a total institution requires yet another process of resocialization. In the Canadian military, soldiers learn discipline and a capacity for hard work. They set aside personal goals to achieve a mission, and they take pride in the accomplishments of their units. Many soldiers who leave the military transition these skills into excellent careers. Others find themselves lost upon leaving, uncertain about the outside world, and what to do next. The process of resocialization to civilian life is not a simple one.

Key Terms

adolescence: A period stretching from puberty to about 18-years-old characterized by the role adjustment from childhood to adulthood.

agency: The ability to choose and act independently of external constraints.

anticipatory socialization: When we prepare for future life roles.

degradation ceremony: The process by which new members of a total institution lose aspects of their old identity and are given new ones.

doing gender: When people perform tasks based upon the gender assigned to them by society.

game stage: The stage in child development in which children begin to recognize and interact with others on the basis of fixed norms and roles.

generalized other: The common behavioural expectations of general society.

hidden curriculum: The informal teaching done in schools that socializes children to societal norms.

I and me: The two components or phases of the self-reflective self.

liquid modernity: The fluid and transitory nature of modern life, which is increasingly fragmented and cut into a succession of ill-connected episodes.

looking glass self: The self or self-image that arises as the reaction to the judgement of others.

mass media: The distribution of impersonal information to a wide audience via television, newspapers, radio, and the internet.

moral career: A standard sequence of changes in a person's moral capacity to be answerable for their actions.

moral development: The way people learn what is "good" and "bad" in society.

nature: The influence of our genetic makeup on self development.

nurture: The role that our social environment plays in self development.

peer group: A group made up of people who are similar in age and social status and who share interests.

play stage: A time when children begin to imitate and take on roles that another person might have.

preparatory stage: A time when children are only capable of imitation and have no ability to imagine how others see things.

resocialization: The process by which old behaviours are removed and new behaviours are learned in their place.

rite of passage: A ritual that marks a life cycle transition from a previous status to a new status.

role: The behaviour expected of a person who occupies a particular position.

self: A person's distinct sense of identity as developed through social interaction.

socialization: The process wherein people come to understand societal norms and expectations, to accept society's beliefs, and to be aware of societal values.

stages of child socialization: The four stages of child development (preparatory, play, game, and generalized other) in which the child develops the capacity to assume social roles.

total institution: An institution in which members are required to live in isolation from the rest of society.

Section Summary

5.1. Theories of Self Development

Psychological theories of self development have been broadened by sociologists who explicitly study the role of society and social interaction in self development. Charles Cooley and George Mead both contributed significantly to the sociological understanding of the development of self. Lawrence Kohlberg and Carol Gilligan developed their ideas further, researching how our sense of morality develops. Gilligan added the dimension of gender differences to Kohlberg's theory.

5.2. Why Socialization Matters

Socialization is important because it helps uphold societies and cultures; it is also a key part of individual development. Research demonstrates that who we are is affected by both nature (our genetic and hormonal makeup) and nurture (the social environment in which we are raised). Sociology is most concerned with the way that society's influence affects our behaviour patterns, made clear by the way behaviour varies across class and gender.

5.3. Agents of Socialization

Our direct interactions with social groups, like families and peers, teach us how others expect us to behave. Likewise, a society's formal and informal institutions socialize its population. Schools, workplaces, and the media communicate and reinforce cultural norms and values.

5.4. Socialization Across the Life Course

Socialization is a lifelong process recurring as we enter new phases of life, such as adulthood or old age. Resocialization is a process that removes the socialization we have developed over time and replaces it with newly-learned rules and roles. Because it involves removing old habits that have been built up, resocialization can be a stressful and difficult process.

Section Quiz

5.1. Theories of Self Development

1. Socialization, as a sociological term, describes:

    1. How people interact during social situations.
    2. How people learn societal norms, beliefs, and values.
    3. A person's internal mental state when in a group setting.
    4. The difference between introverts and extroverts.

2. The Harlows' study on rhesus monkeys showed:

    1. Rhesus monkeys raised by other primate species are poorly socialized.
    2. Monkeys can be adequately socialized by imitating humans.
    3. Food is more important than social comfort.
    4. Social comfort is more important than food.

3. What occurs in Lawrence Kohlberg's conventional level?

    1. Children develop the ability to have abstract thoughts.
    2. Morality is developed by pain and pleasure.
    3. Children begin to consider what society considers moral and immoral.
    4. Parental beliefs have no influence on children's morality.

4. What did Carol Gilligan believe earlier researchers into morality had overlooked?

    1. The justice perspective
    2. Sympathetic reactions to moral situations
    3. The perspective of females
    4. How social environment affects how morality develops

5. What is one way to distinguish between psychology and sociology?

    1. Psychology focuses on the mind, while sociology focuses on society.
    2. Psychologists are interested in mental health, while sociologists are interested in societal functions.
    3. Psychologists look inward to understand behaviour, while sociologists look outward.
    4. All of the above.

6. How did nearly complete isolation as a child affect Danielle's verbal abilities?

1. She could not communicate at all.
2. She never learned words, but she did learn signs.
3. She could not understand much, but she could use gestures.
4. She could understand and use basic language like "yes" and "no."

5.2. Why Socialization Matters

7. Why do sociologists need to be careful when drawing conclusions from twin studies?

1. The results do not apply to singletons.
2. The twins were often raised in different ways.
3. The twins may turn out to actually be fraternal.
4. The sample sizes are often small.

8. From a sociological perspective, which factor does not greatly influence a person's socialization?

1. Gender
2. Class
3. Blood type
4. Race

9. Chris Langan's story illustrates that:

1. Children raised in one-parent households tend to have higher IQs.
2. Intelligence is more important than socialization.
3. Socialization can be more important than intelligence.
4. Neither socialization nor intelligence affects college admissions.

5.3. Agents of Socialization

10. Why are wealthy parents more likely than poor parents to socialize their children toward creativity and problem solving?

1. Wealthy parents are socializing their children toward the skills of white-collar employment.
2. Wealthy parents are not concerned about their children rebelling against their rules.
3. Wealthy parents never engage in repetitive tasks.
4. Wealthy parents are more concerned with money than with a good education.

11. How do schools prepare children to one day enter the workforce?

1. With a standardized curriculum
2. Through the hidden curriculum
3. By socializing them in teamwork
4. All of the above

12. Which one of the following is not a way people are socialized by religion?

1. People learn the material culture of their religion.
2. Life stages and roles are connected to religious celebrations.
3. An individual's personal, internal experience of a divine being leads to their faith.
4. Places of worship provide a space for shared group experiences.

13. Which of the following is a manifest function of schools?

    1. Understanding when to speak up and when to be silent
    2. Learning to read and write
    3. Following a schedule
    4. Knowing locker room etiquette

14. Which of the following is typically the earliest agent of socialization?

    1. School
    2. Family
    3. Mass media
    4. Workplace

5.4. Socialization Across the Life Course

15. Which of the following is not an age-related transition point when Canadians must be socialized to new roles?

    1. Infancy
    2. School age
    3. Adulthood
    4. Senior citizen

16. Which of the following is true regarding Canadian socialization of recent high school graduates?

    1. They are expected to take a year off before college.
    2. They are required to serve in the military for one year.
    3. They are expected to enter college, trade school, or the workforce shortly after graduation.
    4. They are required to move away from their parents.

[Quiz answers at the end of chapter]

Short Answer

5.1. Theories of Self Development

1. Think of a current issue or pattern that a sociologist might study. What types of questions would the sociologist ask, and what research methods might he or she employ? Now consider the questions and methods a psychologist might use to study the same issue. Comment on their different approaches.
2. Explain why it's important to use both male and female participants when conducting research. What sociological topics might show gender differences? Provide some examples to illustrate your ideas.

5.2. Why Socialization Matters

1. Why are twin studies an important way to learn about the relative effects of genetics and socialization on children? What questions about human development do you believe twin studies are best for answering? What types of questions would twin studies not be as helpful?
2. Why do you think that people like Chris Langan continue to have difficulty even after they are helped through societal systems? What is it they've missed that prevents them from functioning successfully in the social world?

5.3. Agents of Socialization

1. Do you think it is important that parents discuss gender roles with their young children, or is gender a topic better left for later? How do parents consider gender norms when buying their children books, movies, and toys? How do you believe they should consider it?
2. Based on your observations, when are adolescents more likely to listen to their parents or to their peer groups when making decisions? What types of dilemmas lend themselves toward one social agent over another?

5.4. Socialization Across the Life Course

1. Consider a person who is moving into a university residence, or attending university or boarding school, or even a child beginning kindergarten. How is the process the student goes through a form of socialization? What new cultural behaviours must the student adapt to?
2. Do you think resocialization requires a total institution? Why or why not? Can you think of any other ways someone could be resocialized?

Further Research

5.1. Theories of Self Development

Lawrence Kohlberg was most famous for his research using moral dilemmas. He presented dilemmas to boys and asked them how they would judge the situations. Read about Kohlberg's most famous moral dilemma, known as the Heinz dilemma: http://www.simplypsychology.org/kohlberg.html.

5.2. Why Socialization Matters

Learn more about five other sets of twins who grew up apart and discovered each other later in life: https://lornareiko.wordpress.com/2009/10/08/identical-twins-who-were-separated-at-birth-what-are-they-like/.

5.3. Agents of Socialization

See the controversy surrounding one Canadian couple's refusal socialize their child into gender norms: http://www.dailymail.co.uk/news/article-1389593/Kathy-Witterick-David-Stocker-raising-genderless-baby.html.

5.4. Socialization Across the Life Course

Homelessness is an endemic problem among veterans. Many soldiers leave the military or return from war and have difficulty resocializing into civilian life. Learn more about this problem of homeless veterans.http://openstaxcollege.org/l/NCHV

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Solutions to Section Quiz

1 B, | 2 D, | 3 C, | 4 C, | 5 D, | 6 A, | 7 D, | 8 C, | 9 C, | 10 A, | 11 D, | 12 C, | 13 B, | 14 B, | 15 A, | 16 C, [Return to Quiz]

Image Attributions

Figure 5.8. Prince William by Alexandre Goulet (http://commons.wikimedia.org/wiki/File:2007_WSJ_Prince_William.jpg) used Creative Commons Attribution-Share Alike 3.0 license (http://creativecommons.org/licenses/by-sa/3.0/deed.en)

Long Descriptions

Figure 5.6 Long Description: Psychology and sociology have some overlap. Sociological social psychology (SSP) emphasizes a subject's location in social order, their socialized roles, and historical social context. Psychological social psychology (PSP) emphasizes a subject's mental processes, dispositions, experiences, and immediate social situation. [Return to Figure 5.6].

Figure 5.7 Long Description: A girl wears a sweater and jeans and looks into a mirror. The mirror represents Facebook and shows her reflection wearing a long, professional dress. [Return to Figure 5.7].

5

Chapter 6. Groups and Organizations



Figure 6.1. Students, environmentalists, union members, and Aboriginal people showed up to protest at the Occupy movement in Victoria, B.C. (Photo courtesy of rpaterso/ flickr)

Learning Objectives

6.1. How is Society Possible?

- Understand Simmel's argument "there is no such thing as society as such."
- Distinguish the forms and contents of social interactions.
- Situate sociological structures within three levels of analysis: micro, meso, and macro.

6.2 Groups

- Analyze the operation of a group as more than the sum of its parts.
- Understand primary and secondary groups as two key sociological groups.
- Recognize in-groups, out-groups, and reference groups as subtypes of primary and secondary groups.
- Distinguish between different styles of leadership.
- Explain how conformity is impacted by group membership.

6.3. Networks

- Distinguish between groups, social networks, and formal organizations.
- Analyze the dynamics of dyads, triads, and larger social networks.

6.4. Formal Organizations

- Categorize the different types of formal organizations.
- Define the characteristics of bureaucracies.
- Analyze the opposing tendencies of bureaucracy toward efficiency and inefficiency.

- Identify the concepts of the McDonaldization of society and the McJob as aspects of the process of rationalization.
- Apply the sociological study of groups and bureaucracies to analyze the social conditions of the Holocaust.

Introduction to Groups and Organizations

The punk band NOFX is playing outside in Los Angeles. The music is loud, the crowd pumped up and excited. But neither the lyrics nor the people in the audience are quite what you might expect. Mixed in with the punks and young rebel students are members of local unions, from well-dressed teachers to more grizzled labour leaders. The lyrics are not published anywhere but are available on YouTube: "We're here to represent/The 99 percent/Occupy, occupy, occupy." The song: "Wouldn't It Be Nice If Every Movement Had a Theme Song" (Cabrel, 2011).

The slogan, "We are the 99%," emblematic of the Occupy movement that flourished in North America in 2011 and 2012, refers to the redistribution of wealth from the middle class to the upper class (the "one percenters"). Even during the severe economic crisis after 2008, the personal income, bonuses, and overall share of social wealth of the elite 1% increased. Occupiers observed that the very people responsible for the crisis and the massive loss of wealth in the economy were paying themselves bonuses for a job well done, even while they were receiving billions of dollars in bailouts from the government. This would seem to be a grievance worthy of a movement, but simply having a grievance does not explain the ways in which movements take form as groups.

In Victoria, B.C., a tent community sprang up in Centennial Square outside city hall, just like tent cities in other parts of the country. Through the "horizontal decision-making process" of daily general assemblies, the community decided to change its name from Occupy Victoria to the People's Assembly of Victoria because of the negative colonial connotations of the word "occupy" for Aboriginal members of the group. Occupy Montreal adopted the concept of stepping back or "progressive stack" in their meetings. Men and other dominant movement figures were encouraged to step back from monopolizing the conversation so that a diversity of opinions and experiences could be heard. As the tent cities of the Occupy movement began to be dismantled, forcibly in some cases, a separate movement, Idle No More, emerged to advocate for Aboriginal justice and organized itself according to Aboriginal principles of decentralized leadership. Horizontal decision making processes, progressive stack, and decentralized leadership refer to the different organizational structures these social movements experimented with in rethinking traditional hierarchical structures of organization.

Numerous groups made up the Occupy movement, yet there was no central movement leader. What makes a group something more than just a collection of people? How are leadership functions and styles established in a group dynamic? What unites the people protesting from New York City to Victoria, B.C.? Are homeless people truly aligned with law school students? Do Aboriginal people genuinely feel for the environmental protests against pipelines and fish farming? How does a non-hierarchical organization work? How is the social order of a diverse group maintained when there are no formal regulations in place? What are the implicit or tacit rules that such groups rely on? How do members come to share a common set of meanings concerning what the movement is about?

At one point during the occupation of Wall Street in New York, speakers like Slovenian social critic and philosopher Slavoj Žižek were obliged to abandon the use of microphones and amplification to comply with noise bylaws. They gave their speeches one line at a time and the people within earshot repeated the lines so that those further away could hear. How did this communicational format, despite its cumbersome nature, come to be an expression of the group's solidarity?

6.1. How is Society Possible?

One of the basic questions raised in sociology is: How is society possible? What holds society together? What gives society form and continuity? This was the classical sociologist Georg Simmel's basic question. In his essay, "The Problem of Sociology," Simmel (1908/1971) begins by saying: "Society exists where a number of individuals enter into interaction." This would appear to be a truism. After all, what else could society be? However, a few pages later, he reaches the conclusion that:



Figure 6.2. Slavoj Žižek addresses the crowd at Occupy Wall Street: "You don't need to be a genius to lead, anyone can be a leader." (Photo courtesy of Daniel Latorre/Flickr)

> With each formation of parties, with each joining for common tasks or in a common feeling or way of thinking, with each articulation of the distribution of positions of submission and domination, with each common meal, with each self-adornment for others — with every growth of new synthesizing phenomena such as these, the same group becomes "more society" than it was before. *There is no such thing as society "as such"*; that is, there is no society in the sense that it is the condition for the emergence of all these particular phenomena. For there is no such thing as interaction "as such" — there are only specific kinds of interaction. And it is with their emergence that society too emerges, for they are neither the cause nor the consequence of society but are, themselves, society. The fact that an extraordinary multitude and variety of interactions operate at any one moment has given a seemingly autonomous historical reality to the general concept of society (Simmel, 1908/1971, emphasis is the editor's).

There is no such thing as society as such. There is no such thing as "society" outside of the interactions between the individuals that compose it. Society is the name we give to the "extraordinary multitude and variety" of specific interactions between individuals that are occurring at any particular moment.

If society is nothing but these simultaneous interactions, Simmel's problem of sociology is clear. Sociology, as the "science of society," appears to be a discipline without an object! Society is not an object or a thing; it is a mirage, a name we have given to the multitude of ongoing, unfinished processes of interaction between individuals. This means we have to ask the questions of sociology at a more basic level. How do these processes hold together and take shape? How are we able to recognize and talk about different social phenomena like the formation of parties, the joining together in common tasks, the creation of hierarchies, the wearing of jewellery, etc.? If society is nothing but a number of individuals who have entered into specific interactions, how do widespread norms of behaviour, structured relations of power, and predictable relationships between social variables form?

Punk rock in the 1970s saw itself returning to the roots of rock and roll. Part of this was to simplify the structure of the music to renew rock and roll as a form of music. This is a good metaphor for how Simmel understands social interaction between individuals as both a mutual attunement and an act of creation. For a coherent interaction to take place, everyone tunes their instruments together (at least somewhat) and plays the same notes and chords. However, this attunement also enables everyone to introduce new elements into the interaction and to invent new musical or social forms (or renew old ones). Along with the new musical form of punk rock came new lyrical and thematic contents: anger, disillusionment, anarchy, class politics, etc.

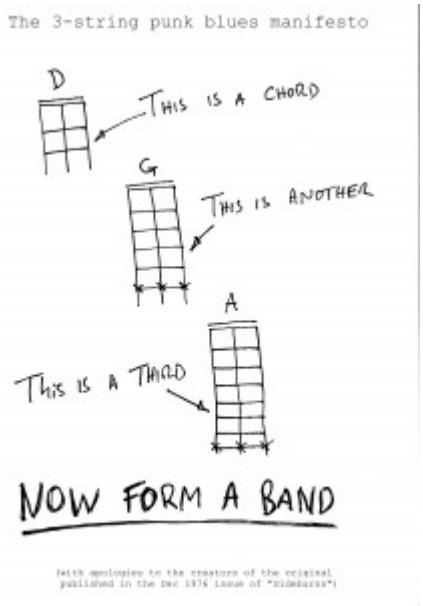


Figure 6.3. Punk rock's stripped down "do it yourself" manifesto was illustrated in a diagram from the punkzine Sideburns in 1977. The attitude of building music from nothing was central to the creation of punk as a new musical form or genre within rock and roll. (Image courtesy of Mark Cottle, http://www.airburst.co.uk licensed under a Creative Commons Attribution-Share Alike 2.0 UK: England & Wales License)

Simmel's solution to the problem of how society is possible is based on the idea that the mutual influence of individuals on each other during interaction creates mutual attunements, not unlike a band tuning its instruments. This mutual influence in turn creates enduring social forms (hence the term *formal sociology* to describe Simmel's work). We will discuss Simmel's formal sociology later in the chapter. In general, however, the solution to the question — How is society possible? — differs depending on the level of analysis used to pose the question. Excluding the global for the time being, sociologists describe three levels of social interaction: micro, meso, and macro.

Micro Meso Macro

At the micro-level of analysis, the focus is on the social dynamics of face-to-face interaction: How are specific individuals in specific locations able to interact in a coherent and consistent manner? For example, how is a conversation possible? How do you know when it is your turn to speak or when someone has been speaking too long? We discussed various types of social interaction at the micro-level in the chapter on social interaction.

At the meso-level of analysis, the focus shifts to the characteristics of specific networks, groups, and organizations (i.e., collectivities). The meso-level refers to the connection, interaction and ongoing coordination of numerous different social roles simultaneously. When we speak of a school, for example, we need to move beyond the analysis of single face-to-face interactions–interactions in a single setting where participants are co-present–to examine the combined interactions and relationships between students, parents, teachers, and administrators. At this level, we ask, how do the properties of different types of social collectivity affect or alter the behaviour of individuals? Why does an individual's behaviour change when they are in a collectivity? How do collectivities constrain or enable their members to act in certain ways? What is it about collectivities that entice people to conform? In these meso-level examples we are still talking about specific, identifiable individuals–albeit not necessarily in direct face-to-face situations–but take into account the complex entwinement of their lives to account for their behaviour.

Finally, at the macro-level of analysis, the focus is on the properties of large-scale, society-wide social interactions:

the dynamics of institutions, classes, or whole societies. The macro therefore extends beyond the immediate milieu or direct experience of individuals. These large-scale social structures might be nothing more than the aggregations of specific interactions between individuals at any particular moment as Simmel argues. However, the properties of structures, institutions, and societies — described by statistical analysis, cross-cultural comparisons, or historical research — also have a reality that Emile Durkheim called *sui generis* (i.e., of their own kind). The properties that make society possible at a macro scale cannot be explained by, or reduced to, their components without missing their most important features.



Figure 6.4. Hockey is a social activity that can be examined at micro-, meso-, and macro-levels of analysis. (Image courtesy of Jerry Meaden/Flickr)

To illustrate the micro, meso, and macro distinction, we might consider how a sociologist would analyze the game of hockey. At the micro-level of analysis, the sociologist would be interested in the interpersonal structures and role-play that governs how various specific individuals (players, coaches, managers, owners, fans, etc.) interact face to face. With respect to the players, how do they interact on the ice in a coherent manner? How do they coordinate their activities to win games? How do they make the game work? In part, this analysis is a matter of simply knowing the rules of the game and each player's role or position (center, winger, defense, goalie). From a different angle, the analysis has to do with the players practicing the plays by which they move the puck out of the defensive zone, cross the blue line into the offensive zone, defend against offensive plays, cycle the puck behind the net, set up a power play, etc. From another angle, the analysis is also a matter of the personal dynamic between individual players, their ability to read each other's cues, to anticipate each other's moves, and to work off each other's strengths, etc. (or the failure to do so). In this regard, hockey is an entirely symbolic interaction, which depends on individuals sending signals and interpreting signals. It is, after all, a game based on chasing a small disk of rubber around a frozen surface of ice. It is thoroughly symbolic.

At the meso-level of analysis, a sociologist takes into account group dynamics involving a number of different roles simultaneously such as team membership or fandom. How and why do fans get so emotionally involved in the fortunes of their favourite team? How do they sort themselves into categories — "true" fans and "occasional" fans — and with what consequences? How do team rivalries develop? Similarly, the sociologist might be interested in the hockey team as a type of institutional arrangement of roles that organizes its members by collectively defining roles, functions, norms, official rules, hierarchical relationships, and channels of communication, etc.

The meso-level sociologist might also be interested in trying to define what defines hockey as a type of activity — a "game." Roger Caillois (1961) noted that games, or what Simmel called the "play forms" of association, constitute a separate and unique type of activity. We cross a boundary whenever we leave the ordinary world of everyday life to enter the zone of play. In particular, games are defined by six characteristics:

1. They are free (playing cannot be obligatory),
2. They are separate (play is distinct from ordinary life),
3. They are uncertain (outcomes cannot be determined in advance),
4. They are unproductive (play *by itself* creates neither goods nor wealth),
5. They are governed by rules (under conventions that suspend ordinary laws), and
6. They are make-believe (they partake in a second reality or a "free unreality").

In part, due to the distinction between games and normal life, activities like the use of violence and the infliction of injury — that would be punishable by law off the ice — are events that are frequently celebrated (or at most deplored) when they occur on the ice. It is the status of hockey as a game that makes the issue of its violence both ambiguous and subject to arbitrary assessments and punishments.

At the macro-level of analysis, the sociologist would be interested in how hockey is structured by the type of society in which it is embedded. The Micmac game of wolchamaadijik, which is cited as an early stick and ball progenitor of Canadian hockey, was played in the context of ceremonial exchanges between native tribes (Rand, 2005). NHL hockey, on the other hand, is a capitalist enterprise, and as such, it takes the form of a commodity produced for sale on the market for profit. The commodity is the spectacle of the hockey game, which fans pay to see and advertisers pay to use as a vehicle for promoting their products. Therefore, the organization and dynamics of the sport are defined by the logic of capital as Marx defined it — a logic in which teams are competitive corporations that invest in their players like any other asset; in which team hometowns are assessed in terms of their viability as profitable markets (hence the oddity of having teams based in Florida or California where natural ice probably has not existed for 10,000 years); in which the logic of class struggle periodically leads to disruptions in play (such as lock-outs and strikes); and in which an elaborate set of regulations (like salary caps and organized draft picks) are instituted by the league to ensure the viability of the competition and manage the excesses and crises that are tendencies of capitalist accumulation.

Making Connections: Classical Sociologists

Georg Simmel and Formal Sociology



Figure 6.5. Georg Simmel. (Image courtesy of Wikimedia Commons)

Georg Simmel (1858–1918) was an early German sociologist and contemporary of Max Weber. He developed what he called **formal sociology**, or the sociology of social forms, in order to understand how a collection of individuals driven by their own individualistic interests could coalesce into a group with common purposes that could persist and develop through time. When he said that "society exists where a number of individuals enter into interaction" (1908/1971), he meant that whenever people gather, something happens that would not have happened if the individuals had remained alone. They begin to "correlate their condition" with that of others. They influence others and are influenced in return. A "reciprocity of effects" or "reciprocal influence" occurs that Simmel calls "sociation." People *attune* themselves to one another in a way that is very similar to musicians tuning their instruments to one another. A pattern or *form* of interaction emerges that begins to guide or coordinate the behaviour of the individuals.

Key to Simmel's analysis is the distinction he makes between the **contents** and **forms** of sociation. Individuals enter into interaction on the basis of their specific drives, needs, purposes, or interests (erotic, spiritual, acquisitive, defensive, playful, etc.). He defines these specific factors as the *contents* of the interaction. As Simmel says, "In themselves, these materials which fill life, these motivations which propel it, are not social… strictly speaking"(1908/1971). It is

"only when they transform the mere aggregation of isolated individuals into specific *forms* of being with and for one another… in which individuals grow together into a unity and within which their interests are realized" that these contents become social (emphasis is the editor's).

Therefore, the *forms* of sociation are the true objects of sociology because only through these forms can the social (i.e., "reciprocal influence") be said to exist. Simmel (1908/1971) notes that innumerable types of forms are possible, including "superiority, subordination, competition, division of labour, formation of parties, representation, inner solidarity coupled with exclusiveness from the outside," etc. These forms are the patterns of behaviour that guide individuals' actions in different social settings. Therefore, his analysis shifts from the micro-level to the meso- and macro-levels when he posits how the forms themselves endure and work on the individuals who compose them.

An example Simmel uses is of a cocktail party where a subtle set of instructions begins to emerge which defines what can and cannot be said. In a cocktail party where the conversation is light and witty, the effect would be jarring if someone suddenly tried to sell you an insurance policy or confided about the spousal abuse they had suffered. The person would be thought of as being crass or inappropriate. Similarly, in the pleasant pastime of flirtation, if one of the parties began to press the other to consummate the flirtation by having sex, the flirtation would be over. Flirtation is a form of interaction in which the answer to the question of having sex — yes or no — is perpetually suspended.



Figure 6.6. Cocktail parties as the play form of interaction. What are the rules for "gracious entertaining"? (Image courtesy of James Vaughan/Flickr)

In both examples, Simmel argued that the social interaction had taken on a specific form**.** Both were examples of what he called the *play form* of social interaction, or **pure sociability**: the pleasure people experience from the mere fact of being together, regardless of the *content* of the interaction (Simmel, 1910/1971). If the cocktail party conversation suddenly turns to a business proposition or an overly personal confession, it is no longer *playful.* The underlying form of the interaction has been violated, even if the participants were not consciously aware that they had adopted a particular form of interaction.

Simmel proposed that sociology would be the study of the social forms that recur in different contexts and with different social contents. The same *play form* governs the interaction in two different contexts with two different contents of interaction: one is the free-ranging content of polite conversation (the cocktail party form); the other is sexual desire (the flirtation form). Different contents or interests can be realized in different forms and vice versa with quite different consequences for the individuals involved. The same erotic impulse (content) can be expressed through the *forms* of a flirtation, a casual sexual relationship, a dating relationship, a marriage, or a transaction with a prostitute. On the other hand, the same form of competition can organize the impulse to play hockey, to gain financially, to learn, or to dress stylishly. The emphasis on *forms* is why Simmel called his approach to the study of society "formal sociology."

Simmel's work on social forms was not just confined to micro-level interactions. He developed an analysis of the **tragedy of culture** in which he argued that the cultural creations of "subjective culture" — like the emergent social forms created by people in their face-to-face interactions, as well as the forms of art, music, literature, political analyses,

etc. — tended to detach themselves from lived experience and become fixed and elaborated in the form of "objective culture" — the accumulated products of human cultural creation. There are intrinsic limits to an individual's ability to assimilate, organize, appreciate, and make sense of these forms. As the quantity of objective culture increases and becomes more complex, it becomes progressively more alienating, incomprehensible, and overwhelming. It takes on a life of its own and the individual can no longer see him- or herself reflected in it. Music, for example, can be enriching, but going to an orchestral performance of contemporary music can often be baffling, as if you need an advanced music degree just to be able to understand that what you are hearing *is* music.

6.2. Groups

Most of us feel comfortable using the word "group" without giving it much thought. But what does it mean to be part of a group? The concept of a group is central to much of how we think about society and human interaction. As Georg Simmel (1858–1915) put it, "[s]ociety exists where a number of individuals enter into interaction" (1908/1950). Society exists in groups. For Simmel, society did not exist otherwise. What fascinated him was the way in which people mutually attune to one another to create relatively enduring forms. In a group, individuals behave differently than they would if they were alone. They conform, they resist, they forge alliances, they cooperate, they betray, they organize, they defer gratification, they show respect, they expect obedience, they share, they manipulate, etc. At this meso-level of interaction, being in a group changes their behaviour and their abilities. This is one of the founding insights of sociology: the whole is greater than the sum of its parts. The group has properties over and above the properties of its individual members. It has a reality *sui generis*, of its own kind. But how exactly does the whole come to be greater?

Defining a Group

How can we hone the meaning of the term **group** more precisely for sociological purposes? The term is an amorphous one and can refer to a wide variety of gatherings, from just two people (think about a "group project" in school when you partner with another student), a club, a regular gathering of friends, or people who work together or share a hobby. In short, the term refers to any collection of at least two people who interact with some frequency and who share a sense that their identity is somehow aligned with the group. Of course, every time people gather, they do not necessarily form a group. An audience assembled to watch a street performer is a one-time random gathering. Conservative-minded people who come together to vote in an election are not a group because the members do not necessarily interact with one another with some frequency. People who exist in the same place at the same time, but who do not interact or share a sense of identity — such as a bunch of people standing in line at Starbucks — are considered an **aggregate**, or a crowd. People who share similar characteristics but are not otherwise tied to one another in any way are considered a **category**.

An example of a category would be Millennials, the term given to all children born from approximately 1980 to 2000. Why are Millennials a category and not a group? Because while some of them may share a sense of identity, they do not, as a whole, interact frequently with each other.

Interestingly, people within an aggregate or category can become a group. During disasters, people in a neighbourhood (an aggregate) who did not know each other might become friendly and depend on each other at the local shelter. After the disaster ends and the people go back to simply living near each other, the feeling of cohesiveness may last since they have all shared an experience. They might remain a group, practising emergency readiness, coordinating supplies for the next emergency, or taking turns caring for neighbours who need extra help. Similarly, there may be many groups within a single category. Consider teachers, for example. Within this category, groups may exist like teachers' unions, teachers who coach, or staff members who are involved with the school board.

Types of Groups

Sociologist Charles Horton Cooley (1864–1929) suggested that groups can broadly be divided into two categories: **primary groups** and **secondary groups** (Cooley, 1909/1963). According to Cooley, primary groups play the most critical role in our lives. The primary group is usually fairly small and is made up of individuals who generally engage face-to-face in long-term, emotional ways. This group serves emotional needs: **expressive functions** rather than pragmatic ones. The

primary group is usually made up of significant others — those individuals who have the most impact on our socialization. The best example of a primary group is the family.

Secondary groups are often larger and impersonal. They may also be task-focused and time-limited. These groups serve an **instrumental function** rather than an expressive one, meaning that their role is more goal- or task-oriented than emotional. A classroom or office can be an example of a secondary group. Neither primary nor secondary groups are bound by strict definitions or set limits. In fact, people can move from one group to another. A graduate seminar, for example, can start as a secondary group focused on the class at hand, but as the students work together throughout their program, they may find common interests and strong ties that transform them into a primary group.

Peter Marsden (1987) refers to one's group of close social contacts as a **core discussion group**. These are individuals with whom you can discuss important personal matters or with whom you choose to spend your free time. Christakis and Fowler (2009) found that the average North American had four close, personal contacts. However, 12% of their sample had no close personal contacts of this sort, while 5% had more than eight close personal contacts. Half of the people listed in the core discussion group were characterized as friends, as might be expected, but the other half included family members, spouses, children, colleagues, and various professional consultants. Marsden's original research from the 1980s showed that the size of the core discussion group decreases as one ages, there was no difference in size between men and women, and those with a post-secondary degree had core discussion groups almost twice the size of those who had not completed high school.

Making Connections: Case Study

Best Friends She's Never Met

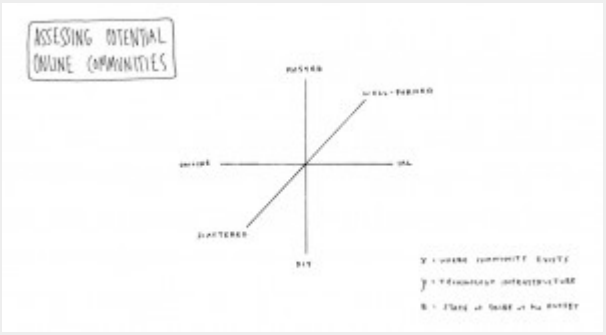


Figure 6.7. What are the parameters of online communities? [Long Description] (Image courtesy of 10ch/Flickr)

Writer Allison Levy worked alone. While she liked the freedom and flexibility of working from home, she sometimes missed having a community of coworkers, both for the practical purpose of brainstorming and the more social "water cooler" aspect. Levy did what many do in the internet age: she found a group of other writers online through a web forum. Over time, a group of approximately 20 writers, who all wrote for a similar audience, broke off from the larger forum and started a private invitation-only forum. While writers in general represent all genders, ages, and interests, it ended up being a collection of 20- and 30-something women who comprised the new forum — they all wrote fiction for children and young adults.At first, the writers' forum was clearly a secondary group united by the members' professions and work situations. As Levy explained, "On the internet, you can be present or absent as often as you want. No one is expecting you to show up." It was a useful place to research information about different publishers, find out who had recently sold what, and track industry trends. But as time passed, Levy found it served a different purpose. Since the group shared other characteristics beyond their writing (such as age and gender), the online conversation naturally turned to matters such as childrearing, aging parents, health, and exercise. Levy found it was a sympathetic place to talk about any number of subjects, not just writing. Further, when people didn't post for several days, others

expressed concern, asking whether anyone had heard from the missing writers. It reached a point where most members would tell the group if they were travelling or needed to be offline for a while.

The group continued to share. One member on the site who was going through a difficult family illness wrote, "I don't know where I'd be without you women. It is so great to have a place to vent that I know isn't hurting anyone." Others shared similar sentiments.

On the other hand, Zygmunt Bauman (2004) discusses the way electronically mediated groups like this online web forum tend to be frail communities, "easy to enter and easy to abandon." They do not substitute for the more tangible and solid "we" feeling of face to face forms of togetherness, which require commitment and risk. Virtual communities "create only an illusion of intimacy and a pretense of community. They are not valid substitutes for 'getting your knees under the table, seeing people's faces, and having real conversation.'" They are a version of what Bauman calls **cloakroom communities**, places where one can hang one's identity like a cloak for the duration of the "show"– i.e., one's interest in the group's theme and interactions — and then collect it again when it's time to move on.

So is this online writers' forum a primary group? Most of these people have never met each other. They live in Hawaii, Australia, Minnesota, and across the world. They may never meet. Levy wrote recently to the group, saying, "Most of my 'real-life' friends and even my husband don't really get the writing thing. I don't know what I'd do without you." Despite the distance and the lack of physical contact, the group clearly fills an expressive need. How are our needs for primary group intimacy altered in the age of electronic media?



Figure 6.8. Engineering and construction students gather around a job site. How do your academic interests define your in- and out-groups? (Photo courtesy of USACEpublicaffairs/flickr)

In-Groups and Out-Groups

One of the ways that groups can be powerful is through inclusion, and its inverse, exclusion. In-groups and out-groups are subcategories of primary and secondary groups that help identify this dynamic. Primary groups consist of both in-groups and out-groups, as do secondary groups. The feeling that one belongs in an elite or select group is a heady one, while the feeling of not being allowed in, or of being in competition with a group, can be motivating in a different way. Sociologist William Sumner (1840–1910) developed the concepts of **in-group** and **out-group** to explain this phenomenon (Sumner, 1906/1959). In short, an in-group is the group that an individual feels he or she belongs to, and believes it to be an integral part of who he or she is. An out-group, conversely, is a group someone doesn't belong to; often there may be a feeling of disdain or competition in relation to an out-group. Sports teams, unions, and secret societies are examples of in-groups and out-groups; people may belong to, or be an outsider to, any of these.

While these affiliations can be neutral or even positive, such as the case of a team-sport competition, the concept of in-groups and out-groups can also explain some negative human behaviour, such as white supremacist movements like the

Ku Klux Klan, or the bullying of gay or lesbian students. By defining others as "not like us" and inferior, in-groups can end up practicing ethnocentrism, racism, sexism, ageism, and heterosexism — manners of judging others negatively based on their culture, race, sex, age, or sexuality. Often, in-groups can form within a secondary group. For instance, a workplace can have cliques of people, from senior executives who play golf together, to engineers who write code together, to young singles who socialize after hours. While these in-groups might show favouritism and affinity for other in-group members, the overall organization may be unable or unwilling to acknowledge it. Therefore, it pays to be wary of the politics of in-groups, since members may exclude others as a form of gaining status within the group.

Making Connections: Social Policy and Debate

Bullying and Cyberbullying: How Technology Has Changed the Game



6.9. Cyberbullying is a 21st century problem. (Image courtesy of Brice Pinson/Flickr)

Most of us know that the old rhyme "sticks and stones may break my bones, but words will never hurt me" is inaccurate. Words can hurt, and never is that more apparent than in instances of bullying. Bullying has always existed, often reaching extreme levels of cruelty in children and young adults. People at these stages of life are especially vulnerable to others' opinions of them, and they're deeply invested in their peer groups. Today, technology has ushered in a new era of this dynamic. Cyberbullying is the use of interactive media by one person to torment another, and it is on the rise. Cyberbullying can mean sending threatening texts, harassing someone in a public forum (such as Facebook), hacking someone's account and pretending to be him or her, posting embarrassing images online, and so on. A study by the Cyberbullying Research Center found that 20% of middle-school students admitted to "seriously thinking about committing suicide" as a result of online bullying (Hinduja and Patchin, 2010). Whereas bullying face-to-face requires willingness to interact with your victim, cyberbullying allows bullies to harass others from the privacy of their homes without witnessing the damage firsthand. This form of bullying is particularly dangerous because it's widely accessible and therefore easier to accomplish.

Cyberbullying, and bullying in general, made international headlines in 2012 when a 15-year-old girl, Amanda Todd, in Port Coquitlam, B.C., committed suicide after years of bullying by her peers, and internet sexual exploitation. A month before her suicide, she posted a YouTube video in which she recounted her story. It began in grade 7 when she had been lured to reveal her breasts in a webcam photo. A year later, when she refused to give an anonymous male "a show," the picture was circulated to her friends, family, and contacts on Facebook. Statistics Canada reported that 7% of internet users aged 18 and over have been cyberbullied, most commonly (73%) by receiving threatening or aggressive emails or text messages. Nine percent of adults who had a child at home aged 8 to 17 reported that at least one of their children had been cyberbullied. Two percent reported that their child had been lured or sexually solicited online (Perreault, 2011).

In the aftermath of Amanda Todd's death, most provinces enacted strict guidelines and codes of conduct obliging schools to respond to cyberbullying and encouraging students to come forward to report victimization. In 2013, the federal government proposed Bill C-13 — the Protecting Canadians from Online Crime Act — which would make

it illegal to share an intimate image of a person without that person's consent. (Critics, however, note that the anti-cyberbullying provision in the bill is only a minor measure among many others that expand police powers to surveil all internet activity.) Will these measures change the behaviour of would-be cyberbullies? That remains to be seen. But hopefully communities can work to protect victims before they feel they must resort to extreme measures.

Reference Groups



Figure 6.10. Athletes are often viewed as a reference group for young people. (Photo courtesy of Wikimedia Commons)

A **reference group** is a group that people compare themselves to — it provides a standard of measurement. In Canadian society, peer groups are common reference groups. Children, teens, and adults pay attention to what their peers wear, what music they like, what they do with their free time — and they compare themselves to what they see. Most people have more than one reference group, so a middle-school boy might look not only at his classmates but also at his older brother's friends and see a different set of norms. And he might observe the antics of his favourite athletes for yet another set of behaviours.

Some other examples of reference groups can be one's church, synagogue, or mosque; one's cultural centre, workplace, or family gathering; and even one's parents. Often, reference groups convey competing messages. For instance, on television and in movies, young adults often have wonderful apartments, cars, and lively social lives despite not holding a job. In music videos, young women might dance and sing in a sexually aggressive way that suggests experience beyond their years. At all ages, we use reference groups to help guide our behaviour and show us social norms. So how important is it to surround yourself with positive reference groups? You may never meet or know a particular reference group, but it may still impact and influence how you act. Identifying reference groups can help you understand the source of the social identities you aspire to or want to distance yourself from.

Making Connections: Sociology in the Real World

University: A World of In-Groups, Out-Groups, and Reference Groups

For a student entering university, the sociological study of groups takes on an immediate and practical meaning. After all, when we arrive someplace new, most of us look around to see how well we fit in, or stand out, in the ways we want. This is a natural response to a reference group, and on a large campus, there can be many competing groups. Say



Figure 6.11. Aikido practice. Which university club would you fit into, if any? Campus club recruitment day offers students an opportunity to learn about these different groups. (Photo courtesy of Kesara Rathnayake/flickr)

you are a strong athlete who wants to play intramural sports, but your favourite musicians are a local punk band. You may find yourself engaged with two very different reference groups.

These reference groups can also become your in-groups or out-groups. For instance, different groups on campus might solicit you to join. Are there student-union-sponsored clubs at your school? Is there a Club Day when the student clubs set up tables and displays? The spelunking club, the Aikido club, the square dance club, the Conservative Party club, the Green Party club, the chess club, the jazz club, the kayak club, the tightrope walkers club, the peace and disarmament club, the French club, the young women in business club — enumerable clubs will try to convince students to join them.

While most clubs are pretty casual, along with a shared interest comes many subtle cues about what sorts of people will fit in and what sorts will not. While most campus groups refrain from insulting competing groups, there is a definite sense of an in-group versus an out-group. "Them?" a member might say, "They're all right, but they are pretty geeky." Or, "Only really straight people join that group." This immediate categorization into in-groups and out-groups means that students must choose carefully, since whatever group they associate with will not just define their friends — it may also define types of people with whom they will not associate.



Figure 6.12. Cadets illustrate how strongly conformity can define groups. (Photo courtesy David Spender/flickr)

Large Groups

It is difficult to define exactly when a small group becomes a large group. One step might be when there are too many people to join in a simultaneous discussion. Another might be when a group joins with other groups as part of a movement that unites them. These larger groups may share a geographic space, such as Occupy Montreal or the People's Assembly of Victoria, or they might be spread out around the globe. The larger the group, the more attention it can garner, and the more pressure members can put toward whatever goal they wish to achieve. At the same time, the larger the group becomes, the more the risk grows for division and lack of cohesion.

One can think of three main social *forms* by which the *content* or activity of a group might be organized to prevent division and lack of cohesion: domination, cooperation, and competition. No matter what the organization is — a hockey franchise, a workplace, or a social movement — the choice of one form of organization over the others has consequences in terms of the loyalty of members and the efficiency and effectiveness of the group in achieving its goals. In the form of **domination,** power is concentrated in the hands of leaders while the power of subordinates is severely restricted or constrained. In extreme versions of domination, like slavery, loyalty and efficiency are low because fear of coercion is the only motivation. In the form of **cooperation** on the other hand, power is distributed relatively equally and loyalty and efficiency are high because the group is based on mutual trust and high levels of commitment. In the form of **competition,** power is distributed unequally but there is latitude for movement based on the outcome of competition for prestige or money. Loyalty and efficiency are relatively high but only as long as the pay-offs are high.

In a Star Trek episode from the 1960s, "Patterns of Force," the crew of the Enterprise discover that a rogue historian has gone against the Prime Directive and reorganized a planet's culture on the basis of Nazi Germany. In order to address the planet's condition of chaos, he appealed to the "efficiency" of Nazism only to unleash a systematic persecution of one native group by the other. The ensuing drama in the episode reveals that the historian mistook domination for efficiency. As Spock puts it at the end of the episode, how could such a noted historian make the logical error of emulating the Nazis? Captain Kirk responds by saying that the failure was in putting so much power in the hands of a dictator, to which Dr. McCoy adds that power corrupts. In fact, as historians point out, Nazi Germany was startlingly *inefficient,* if only because all major decisions were filtered through Hitler himself who was notoriously unpredictable, hard to get the attention of, and lacked any form of personal routine (Kershaw, 1998). The irony of the Star Trek episode is of course that the Starship Enterprise itself is organized on the formal basis of domination. It is only the *leadership style* that differs.

Group Leadership

Often, larger groups require some kind of leadership. In small, primary groups, leadership tends to be informal. After all, most families don't take a vote on who will rule the group, nor do most groups of friends. This is not to say that *de facto* leaders do not emerge, but formal leadership is rare.

In a series of small group studies at Harvard in the 1950s, Robert Bales (1970) studied the group processes that emerged around solving problems. No matter what the specific tasks were, he discovered that in all the *successful* groups — i.e., in the groups that were able to see their tasks through to the end without breaking up — three types of informal leader emerged: a task leader, an emotional leader, and a joker. The task leader was the person who stepped up to organize the group to solve the problem by setting goals and distributing tasks. The emotional leader was the person who helped the group resolve disagreements and frustrations when strong feelings emerged. The joker made fun and fooled around but also had the knack for releasing group tension by making jokes. These leadership roles emerged spontaneously in the small groups without planning or awareness that they were needed. They appear to simply be properties of task-oriented, face-to-face groups.

Making Connections: Case Study

Women Leaders and the Glass Ceiling

Elizabeth May, leader of the Green Party, was voted best parliamentarian of the year in 2012 and hardest-working parliamentarian in 2013. She stands out among the party leaders as both the only female and the only leader focused on



Figure 6.13. Green Party leader Elizabeth May stands out for her gender and her leadership style among federal party leaders. (Photo courtesy Itzafineday/flickr)

changing leadership style. Among her proposals for changing leadership are reducing centralization and hierarchical control of party leaders, allowing MPs to vote freely, decreasing narrow political partisanship, engaging in cross-partisan collaboration, and restoring respect and decorum to House of Commons debates. The focus on a collaborative, non-conflictual approach to politics is a component of her expressive leadership style, typically associated with female leadership qualities.

However, as a female leader Elizabeth May is obliged to walk a tight line that does not generally apply to male politicians. According to some political analysts, women candidates face a paradox: they must be as tough as their male opponents on issues, such as foreign or economic policy, or risk appearing weak (Weeks, 2011). However, the stereotypical expectation of women as expressive leaders is still prevalent. Consider that Hillary Clinton's popularity surged in her 2008 campaign for the U.S. Democratic presidential nomination after she cried on the campaign trail. It was enough for the *New York Times* to publish an editorial, "Can Hillary Cry Her Way Back to the White House?" (Dowd, 2008). Harsh, but her approval ratings soared afterwards. In fact, many compared it to how politically likable she was in the aftermath of President Clinton's Monica Lewinsky scandal.

In the case of Elizabeth May, many pundits believed that she won the 2008 election leaders debate by being firm in her criticism of government policy, and being both intelligent and clear in her statements. (Notably, she was prevented from participating in the 2011 election leaders' debate — perhaps for the same reasons.) She was able to articulate the rationale behind a national carbon tax to reduce greenhouse gases, whereas then Liberal leader Stéphane Dion seemed to struggle to explain his "Green Shift" policy. "We tax the pollution, and we take the taxes off families," she said (Foot, 2008). The idea of winning debates and defeating opponents in a hostile environment is regarded as a masculine virtue. At the same time, May is subject to criticisms that have to do with her femininity, in a way that male politicians are not subject to similar criticisms about their masculinity. Media tycoon Conrad Black called her "a frumpy, noisy, ill-favoured, half-deranged windbag" to which, May quipped, "He's right on one point: I certainly am frumpy. I don't have anything like Barbara Amiel's [Black's well-known journalist wife] sense of style. But on the whole, I figure being attacked by Conrad Black is in its own way an accolade in this country" (Allemang, 2009).

Despite the cleverness of May's retort, the pitfalls of her situation as a female leader reflect broader issues women confront in assuming leadership roles. Whereas women have been closing the gap with men in terms of workforce participation and educational attainment over the last decades, their average income has remained at approximately 70% of men's, and their representation in leadership roles (legislators, senior officials, and managers) has remained at 50% of men's (i.e., men are twice as likely as women to attain leadership roles in these professions than women). In

terms of the representation of women in Parliament, cabinet, and political leadership, the figures are much lower at 15% (despite the fact that several provinces have had women as premiers) (McInturff, 2013).

One concept for describing the situation facing women's access to leadership positions is the **glass ceiling**. Whereas most of the explicit barriers to women's achievement have been removed through legislative action, norms of gender equality, and affirmative action policies, women often get stuck at the level of middle management. There is a glass ceiling or invisible barrier that prevents them from achieving positions of leadership (Tannen, 1994). This is also reflected in gender inequality in income over time. Early in their careers men's and women's incomes are more or less equal but at mid-career, the gap increases significantly (McInturff, 2013).

Tannen argues that this barrier exists in part because of the different work styles of men and women, in particular conversational-style differences. Whereas men are very aggressive in their conversational style and their self-promotion, women are typically consensus builders who seek to avoid appearing bossy and arrogant. As a linguistic strategy of office politics, it is common for men to say "I" and claim personal credit in situations where women would be more likely to use "we" and emphasize teamwork. As it is men who are often in the positions to make promotion decisions, they interpret women's style of communication "as showing indecisiveness, inability to assume authority, and even incompetence" (Tannen, 1994).

Because of the inherent qualities in women's expressive leadership, which in many cases is more effective, their skills, merits, and achievements go unrecognized. In terms of political leadership, one political analyst said bluntly, "women don't succeed in politics — or other professions — unless they act like men. The standard for running for national office remains distinctly male" (Weeks, 2011).

In secondary groups, leadership is usually more overt. There are often clearly outlined roles and responsibilities, with a chain of command to follow. Some secondary groups, like the army, have highly structured and clearly understood chains of command, and many lives depend on those. After all, how well could soldiers function in a battle if they had no idea whom to listen to or if different people were calling out orders? Other secondary groups, like a workplace or a classroom, also have formal leaders, but the styles and functions of leadership can vary significantly.

Leadership function refers to the main focus or goal of the leader. An **instrumental leader** is one who is goal-oriented and largely concerned with accomplishing set tasks. An army general or a Fortune 500 CEO would be an instrumental leader. In contrast, **expressive leaders** are more concerned with promoting emotional strength and health, and ensuring that people feel supported. Social and religious leaders — rabbis, priests, imams, and directors of youth homes and social service programs — are often perceived as expressive leaders. There is a longstanding stereotype that men are more instrumental leaders and women are more expressive leaders. Although gender roles have changed, even today, many women and men who exhibit the opposite-gender manner can be seen as deviants and can encounter resistance. Former U.S. Secretary of State and presidential candidate Hillary Clinton provides an example of how society reacts to a high-profile woman who is an instrumental leader. Despite the stereotype, Boatwright and Forrest (2000) have found that both men and women prefer leaders who use a combination of expressive and instrumental leadership.

In addition to these leadership functions, there are three different **leadership styles. Democratic leaders** encourage group participation in all decision making. The group is essentially cooperative. These leaders work hard to build consensus before choosing a course of action and moving forward. This type of leader is particularly common, for example, in a club where the members vote on which activities or projects to pursue. These leaders can be well-liked, but there is often a challenge that the work will proceed slowly since consensus building is time-consuming. A further risk is that group members might pick sides and entrench themselves into opposing factions rather than reaching a solution.

In contrast, a **laissez-faire leader** (French for "leave it alone") is hands-off, allowing group members to self-manage and make their own decisions. An example of this kind of leader might be an art teacher who opens the art cupboard, leaves materials on the shelves, and tells students to help themselves and make some art. While this style can work well with highly motivated and mature participants who have clear goals and guidelines, it risks group dissolution and a lack of progress.

As the name suggests, **authoritarian leaders** issue orders and assigns tasks. These leaders are clear instrumental leaders with a strong focus on meeting goals. Often, entrepreneurs fall into this mould, like Facebook founder Mark Zuckerberg.



Figure 6.14. This gag gift demonstrates how female leaders may be viewed if they violate social norms. [Long Description] (Photo courtesy of istolethetv/flickr)

Not surprisingly, this type of leader risks alienating the workers. There are times, however, when this style of leadership can be required. In different circumstances, each of these leadership styles can be effective and successful. Consider what leadership style you prefer. Why? Do you like the same style in different areas of your life, such as a classroom, a workplace, and a sports team?

Conformity

We all like to fit in to some degree. Likewise, when we want to stand out, we want to choose how we stand out and for what reasons. For example, a woman who loves cutting-edge fashion and wants to dress in thought-provoking new styles likely wants to be noticed within a framework of high fashion. She would not want people to think she was too poor to find proper clothes. **Conformity** is the extent to which an individual complies with group norms or expectations. As you might recall, we use reference groups to assess and understand how we should act, dress, and behave. Not surprisingly, young people are particularly aware of who conforms and who does not. A high school boy whose mother makes him wear ironed, button-down shirts might protest that he will look stupid — that everyone else wears T-shirts. Another high school boy might like wearing those shirts as a way of standing out. Recall Georg Simmel's analysis of the contradictory dynamics of fashion: it represents both the need to conform and the need to stand out. How much do you enjoy being noticed? Do you consciously prefer to conform to group norms so as not to be singled out? Are there people in your class or peer group who immediately come to mind when you think about those who do, and do not, want to conform?

A number of famous experiments in the 1950s, 60s, and 70s tested the propensity of individuals to conform to authority. We have already examined the Stanford Prison experiment in Chapter 2. Within days of beginning the simulated prison experiment, the random sample of university students proved themselves capable of conforming to the roles of prison guards and prisoners to an extreme degree, even though the conditions were highly artificial (Haney, Banks, and Zimbardo, 1973).

Stanley Milgram conducted experiments in the 1960s to determine how structures of authority rendered individuals

obedient (Milgram, 1963). This was shortly after the Adolf Eichmann war crime trial in which Eichmann claimed that he was just a bureaucrat following orders when he helped to organize the Holocaust. Milgram had experimental subjects administer, what they were led to believe were, electric shocks to a subject when the subject gave a wrong answer to a question. Each time a wrong answer was given, the experimental subject was told to increase the intensity of the shock. The experiment was supposed to be testing the relationship between punishment and learning, but the subject receiving the shocks was an actor. As the experimental subjects increased the amount of voltage, the actor began to show distress, eventually begging to be released. When the subjects became reluctant to administer more shocks, Milgram (wearing a white lab coat to underline his authority as a scientist) assured them that the actor would be fine and that the results of the experiment would be compromised if the subject did not continue. Seventy-one percent of the experimental subjects were willing to continue administering shocks, even beyond 285 volts, despite the actor crying out in pain, and the voltage dial labelled with warnings like "Danger: Severe shock."

Making Connections: Sociological Research

Groupthink: Conforming to Expectations

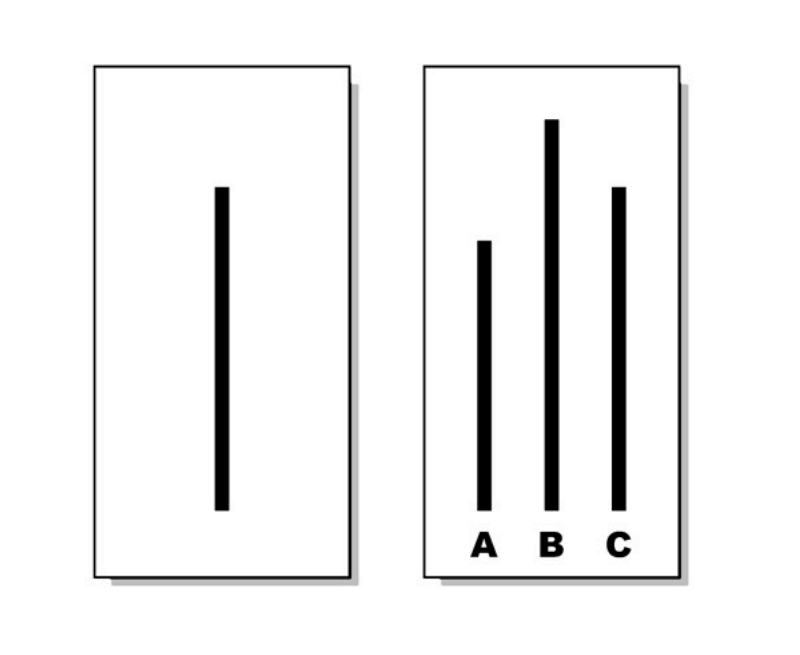


Figure 6.15. In the Asch conformity experiments, a subject had to determine which of the three lines on the left matched the length of the line on the right. (Photo courtesy of Nyenyec/Wikimedia Commons). http://commons.wikimedia.org/wiki/File:Asch_experiment.png

Psychologist Solomon Asch (1907–1996) conducted experiments that illustrated how great the pressure to conform is, specifically within a small group (1956). In 1951, he sat a small group of eight people around a table. Only one of the people sitting there was the true experimental subject; the rest were actors or associates of the experimenter. However, the subject was led to believe that the others were all, like him, people brought in for an experiment in visual judgments. The group was shown two cards, the first card with a single vertical line, and the second card with three vertical lines differing in length. The experimenter polled the group, asking each participant, one at a time, which line on the second card matched up with the line on the first card.

However, this was not really a test of visual judgment. Rather, it was Asch's study on the pressures of conformity. He was curious to see what the effect of multiple wrong answers would be on the subject, who presumably was able to

tell which lines matched. In order to test this, Asch had each planted respondent answer in a specific way. The subject was seated in such a way that he had to hear almost everyone else's answers before it was his turn. Sometimes the non-subject members would unanimously choose an answer that was clearly wrong.

So what was the conclusion? Asch found that 37 out of 50 test subjects responded with an "obviously erroneous" answer at least once. When faced by a unanimous wrong answer from the rest of the group, the subject conformed to a mean of four of the staged answers. Asch revised the study and repeated it, wherein the subject still heard the staged wrong answers, but was allowed to write down his answer rather than speak it aloud. In this version, the number of examples of conformity — giving an incorrect answer so as not to contradict the group — fell by two-thirds. He also found that group size had an impact on how much pressure the subject felt to conform.

The results showed that speaking up when only one other person gave an erroneous answer was far more common than when five or six people defended the incorrect position. Finally, Asch discovered that people were far more likely to give the correct answer in the face of near-unanimous consent if they had a single ally. If even one person in the group also dissented, the subject conformed only a quarter as often. Clearly, it was easier to be a minority of two than a minority of one.

Asch concluded that there are two main causes for conformity: people want to be liked by the group or they believe the group is better informed than they are. He found his study results disturbing. To him, they revealed that intelligent, well-educated people would, with very little coaxing, go along with an untruth. This phenomenon is known as **groupthink**, the tendency to conform to the attitudes and beliefs of the group despite individual misgivings. He believed this result highlighted real problems with the education system and values in our society (Asch, 1956).

What would you do in Asch's experiment? Would you speak up? What would help you speak up and what would discourage you?

6.3. Networks

Dyads, Triads, and Social Networks

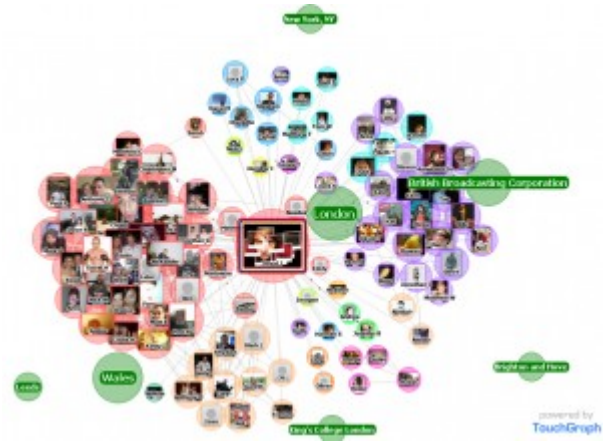


Figure 6.16. A visual representation of network connections formed through Facebook showing dense nodes of tightly interconnected friends and outliers. (Image courtesy of David Jones/Flickr)

A small group is typically one where the collection of people is small enough that all members of the group know each other and share simultaneous interaction, such as a nuclear family, a dyad, or a triad. Georg Simmel wrote extensively about the difference between a **dyad**, or two-member group, and a **triad**, a three-member group (Simmel, 1908/1950). No matter what the content of the groups is — business, friendship, family, teamwork, etc. — the dynamic or *formal* qualities of the groups differ simply by virtue of the number of individuals involved. The *forms of sociation* available to individuals differ significantly for dyads and triads, no matter the specific reason (*content*) for the sociation (e.g., friendship, love, business,

leisure, etc.). The social dynamic inheres in the number of individuals, no matter who they are or their specific interests. This insight forms the basis of the analysis of networks, which are another of the major meso-level social phenomena examined in sociology.

In a dyad, if one person withdraws, the group can no longer exist. Examples include a divorce, which effectively ends the "group" of the married couple, or two best friends never speaking again. Neither of the two members can hide what he or she has done behind the group, nor hold the group responsible for what he or she has failed to do.

In a triad, however, the dynamic is quite different. If one person withdraws, the group lives on. A triad has a different set of relationships. If there are three in the group, two-against-one dynamics can develop and the potential exists for a majority opinion on any issue. At the same time, the relationships in a triad cannot be as close as in a dyad because a third person always intrudes. Where a group of two is both closer and more unstable than a group of three, because it rests on the immediate, ongoing reciprocity of the two members, a group of three is able to attain a sense of super-personal life, independent of the members.

The difference between a dyad and a triad is an example of network analysis. A **social network** is a collection of people who exchange resources (emotional, informational, financial, etc.) tied together by a specific configuration of connections. They can be characterized by the number of people involved, as in the dyad and triad, but also in terms of their *structures* (who is connected to whom) and *functions* (what resources flow across ties). The particular configurations of the connections determine how networks are able to do more things and different things than individuals acting on their own could. Networks have this effect, regardless of the content of the connections or persons involved.

For example, if one person phones 50 people one after the other to see who could come out to play ball hockey on Wednesday night, it would take a long time to work through the phone list. The *structure* of the network would be one in which the telephone caller has an individual connection with each of the 50 players, but the players themselves do not necessarily have any connections with each other. There is only one node in the network. On the other hand, if the telephone caller phones five key (or nodal) individuals, who would then call five individuals, and so on, then the telephone calling would be accomplished much more quickly. A telephone tree like this has a different network structure than the single telephone caller model does and can therefore accomplish the task much more efficiently and quickly. Of course the responsibility is also shared so there are more opportunities for the communication network to break down.

Network analysis is interesting because much of social life can be understood as operating outside of either formal organizations or traditional group structures. Social media like Twitter or Facebook connect people through networks. One's posts are seen by friends, but also by friends of friends. The revolution in Tunisia in 2010–2011 was aided by social media networks, which were able to disseminate an accurate, or alternate, account of the events as they unfolded, even while the official media characterized the unrest as vandalism and terrorism (Zuckerman, 2011). On the other hand, military counterinsurgency strategies trace cell phone connections to model the networks of insurgents in asymmetrical or guerilla warfare. Increased densities of network connections indicate the centrality of key insurgents and the ability of insurgents to mount coordinated attacks (Department of the Army, 2006). The amorphous nature of global capital and the formation of a global capitalist class consciousness can also be analyzed by mapping interlocking directorates; namely, the way institutionalized social networks are established between banks and corporations in different parts of the world through shared board members. Network analysis reveals the break up of national-based corporate elite networks, and the establishment of a unified and coordinated transatlantic capitalist class (Carroll, 2010).

Christakis and Fowler (2009) argue that social networks are influential in a wide range of social aspects of life, including political opinions, weight gain, and happiness. They develop Stanley Milgram's claim that there is only six degrees of separation between any two individuals on Earth by adding that in a network, it can be demonstrated that there are also three degrees of influence. That is, one is not only influenced by one's immediate friends and social contacts, but by their friends, and their friends' friends. For example, an individual's chance of becoming obese increases 57% if a friend becomes obese; it increases by 20% if it is a friend's friend who becomes obese; and it increases 10% if it is a friend's friend's friend who becomes obese. Beyond the third degree of separation, there is no measurable influence.

6.4. Formal Organizations

A complaint of modern life is that society is dominated by large and impersonal secondary organizations. From schools to businesses to health care to government, these organizations are referred to as **formal organizations**. A formal

organization is a large secondary group deliberately organized to achieve its goals efficiently. Typically, formal organizations are highly bureaucratized. The term **bureaucracy** refers to what Max Weber termed "an ideal type" of formal organization (1922/1946). In its sociological usage, "ideal" does not mean "best"; it refers to a general model that describes a collection of characteristics, or a type that could describe most examples of the item under discussion. For example, if your professor were to tell the class to picture a car in their minds, most students will picture a car that shares a set of characteristics: four wheels, a windshield, and so on. Everyone's car will be somewhat different, however. Some might picture a two-door sports car while others might picture an SUV. It is possible for a car to have three wheels instead of four. However, the general idea of the car that everyone shares is the ideal type. Bureaucracies are similar. While each bureaucracy has its own idiosyncratic features, the way each is deliberately organized to achieve its goals efficiently shares a certain consistency. We will discuss bureaucracies as an ideal type of organization.

Types of Formal Organizations



Figure 6.17. Cub and Guide troops and correctional facilities are both formal organizations. (Photo (a) courtesy of Paul Hourigan/Hamilton Spectator, 1983; Photo (b) courtesy of CxOxS/flickr)

Sociologist Amitai Etzioni (1975) posited that formal organizations fall into three categories. **Normative organizations**, also called **voluntary organizations**, are based on shared interests. As the name suggests, joining them is voluntary and typically people join because they find membership rewarding in an intangible way. Compliance to the group is maintained through moral control. The Audubon Society or a ski club are examples of normative organizations. **Coercive organizations** are groups that one must be coerced, or pushed, to join. These may include prison, the military, or a rehabilitation centre. Compliance is maintained through force and coercion. Goffman (1961) states that most coercive organizations are **total institutions**. A total institution is one in which inmates live a controlled life apart from the rest of society, and in which total resocialization takes place. The third type are **utilitarian organizations**, which, as the name suggests, are joined because of the need for a specific material reward. High school or a workplace would fall into this category — one joined in pursuit of a diploma, the other in order to make money. Compliance is maintained through remuneration and rewards.

Table 6.1. Etzioni's Three Types of Formal Organizations (Source: Etzioni, 1975)

	Normative or Voluntary	Coercive	Utilitarian
Benefit of Membership	Non-material benefit	Corrective or disciplinary benefit	Material benefit
Type of Membership	Volunteer basis	Obligatory basis	Contractual basis
Feeling of Connectedness	Shared affinity	Coerced affinity	Pragmatic affinity

Bureaucracies

Bureaucracies can be described as an **ideal type** of formal organization. This does not mean that they are ideal in an ethical sense but that the logic of their components can be laid out according to an idealized model. Not all formal

organizations or bureaucracies will necessarily conform to the ideal type. Pioneer sociologist Max Weber (1922/1946) popularly characterized bureaucracy through an ideal type description as having a hierarchy of authority, a clear division of labour, explicit rules, and impersonality. Bureaucracies were the basic form of rational efficient organization, yet people often complain about bureaucracies, declaring them slow, rule-bound, difficult to navigate, and unfriendly. Let us take a look at terms that define bureaucracy as an ideal type of formal organization to understand what they mean.

Hierarchy of authority refers to the aspect of bureaucracy that places one individual or office in charge of another, who in turn must answer to her own superiors. For example, if you are an employee at Walmart, your shift manager assigns you tasks. Your shift manager answers to the store manager, who must answer to the regional manager, and so on in a chain of command up to the CEO, who must answer to the board members, who in turn answer to the stockholders. There is a clear chain of authority that enables each person to know who he or she is answerable to or responsible for, which is necessary for the organization to make and comply with decisions.

A **clear division of labour** refers to the fact that within a bureaucracy, each individual has a specialized task to perform. For example, psychology professors teach psychology, but they do not attempt to provide students with financial aid forms. In this case, it is a clear and commonsensical division. But what about in a restaurant where food is backed up in the kitchen and a hostess is standing nearby texting on her phone? Her job is to seat customers, not to deliver food. Is this a smart division of labour?

The existence of **explicit rules** refers to the way in which rules are outlined, written down, and standardized. There is a continuous organization of official functions bound by rules. For example, at your college or university, student guidelines are contained within the student handbook. As technology changes and campuses encounter new concerns like cyberbullying, identity theft, and other issues, organizations are scrambling to ensure their explicit rules cover these emerging topics.

Bureaucracies are also characterized by **impersonality**, which takes personal feelings out of professional situations. Each office or position exists independently of its incumbent, and clients and workers receive equal treatment. This characteristic grew, to some extent, out of a desire to eliminate the potential for nepotism, backroom deals, and other types of "irrational" favouritism, simultaneously protecting customers and others served by the organization. Impersonality is an attempt by large formal organizations to protect their members. However, the result is often that personal experience is disregarded. For example, you may be late for work because your car broke down, but the manager at Pizza Hut doesn't care why you are late, only that you are late.

Finally, bureaucracies are, in theory at least, **meritocracies**, meaning that hiring and promotion are based on proven and documented skills, rather than on nepotism or random choice. In order to get into graduate school, you need to have an impressive transcript. In order to become a lawyer and represent clients, you must graduate from law school and pass the provincial bar exam. Of course, there is a popular image of bureaucracies that they reward conformity and sycophancy rather than skill or merit. How well do you think established meritocracies identify talent? Wealthy families hire tutors, interview coaches, test-prep services, and consultants to help their children get into the best schools. This starts as early as kindergarten in New York City, where competition for the most highly regarded schools is especially fierce. Are these schools, many of which have copious scholarship funds that are intended to make the school more democratic, really offering all applicants a fair shake?

Max Weber (1922/1946) summarizes:

> Precision, speed, unambiguity, knowledge of the files, continuity, discretion, unity, strict subordination, reduction of friction and of material and personal costs — these are raised to the optimum point in the strictly bureaucratic administration … Bureaucratization offers above all the optimum possibility for carrying through the principle of specializing administrative functions according to purely objective considerations . . . The 'objective' discharge of business primarily means a discharge of business according to calculable rules and 'without regard for persons.'

There are several positive aspects of bureaucracies. They are intended to improve efficiency, ensure equal opportunities, and increase efficiency. There are times when rigid hierarchies are needed. However, there is also a clear component of *irrationality* within the rational organization of bureaucracies. Firstly, bureaucracies create conditions of bureaucratic alienation in which workers cannot find meaning in the repetitive, standardized nature of the tasks they are obliged to

perform. As Max Weber put it, the "individual bureaucrat cannot squirm out of the apparatus in which he is harnessed… He is only a single cog in an ever-moving mechanism which prescribes to him an essentially fixed route of march" (1922/1946). Secondly, bureaucracies can lead to bureaucratic inefficiency and ritualism (red tape). They can focus on rules and regulations to the point of undermining the organization's goals and purpose. Thirdly, bureaucracies have a tendency toward inertia. You may have heard the expression "trying to turn a tanker around mid-ocean," which refers to the difficulties of changing direction with something large and set in its ways. Inertia means bureaucracies focus on perpetuating themselves rather than effectively accomplishing or re-evaluating the tasks they were designed to achieve. Finally, as Robert Michels (1911/1949) suggested, bureaucracies are characterized by the **iron law of oligarchy** in which the organization is ruled by a few elites. The organization serves to promote the self-interest of oligarchs and insulate them from the needs of the public or clients.

Remember that many of our bureaucracies grew large at the same time that our school model was developed — during the Industrial Revolution. Young workers were trained and organizations were built for mass production, assembly-line work, and factory jobs. In these scenarios, a clear chain of command was critical. Now, in the information age, this kind of rigid training and adherence to protocol can actually decrease both productivity and efficiency. Today's workplace requires a faster pace, more problem solving, and a flexible approach to work. Smaller organizations are often more innovative and competitive because they have flatter hierarchies and more democratic decision making, which invites more communication, greater networking, and increased individual participation of members. Too much adherence to explicit rules and a division of labour can leave an organization behind. Unfortunately, once established, bureaucracies can take on a life of their own. As Max Weber said, "Once it is established, bureaucracy is among those social structures which are the hardest to destroy" (1922/1946).



Figure 6.18. This McDonald's storefront in Egypt shows the McDonaldization of society. (Photo courtesy of s_w_ellis/flickr)

The McDonaldization of Society

The **McDonaldization** of society (Ritzer, 1994) refers to the increasing presence of the fast-food business model in common social institutions. This business model includes efficiency (the division of labour), predictability, calculability, and control (monitoring). For example, in your average chain grocery store, people at the cash register check out customers while stockers keep the shelves full of goods, and deli workers slice meats and cheese to order (efficiency). Whenever you enter a store within that grocery chain, you receive the same type of goods, see the same store organization, and find the same brands at the same prices (predictability). You will find that goods are sold by the kilogram, so that you can weigh your fruit and vegetable purchases rather than simply guessing at the price for that bag of onions, while the employees use a time card to calculate their hours and receive overtime pay (calculability). Finally, you will notice that all store employees are wearing a uniform (and usually a name tag) so that they can be easily identified. There are security cameras to monitor the store, and some parts of the store, such as the stockroom, are generally considered off-limits to customers (control).

While McDonaldization has resulted in improved profits and an increased availability of various goods and services to more people worldwide, it has also reduced the variety of goods available in the marketplace while rendering available products uniform, generic, and bland. Think of the difference between a mass-produced shoe and one made by a local cobbler, between a chicken from a family-owned farm versus a corporate grower, or a cup of coffee from the local roaster

instead of one from a coffee-shop chain. Ritzer also notes that the rational systems, as efficient as they are, are irrational in that they become more important than the people working within them, or the clients being served by them. "Most specifically, irrationality means that rational systems are unreasonable systems. By that I mean that they deny the basic humanity, the human reason, of the people who work within or are served by them." (Ritzer, 1994)

Making Connections: Sociological Research

Secrets of the McJob

We often talk about bureaucracies disparagingly, and no organizations have taken more heat than fast-food restaurants. The book and movie *Fast Food Nation: The Dark Side of the All-American Meal* by Eric Schossler (2001) paints an ugly picture of what goes in, what goes on, and what comes out of fast-food chains. From their environmental impact to their role in the U.S. obesity epidemic, fast-food chains are connected to numerous societal ills. Furthermore, working at a fast-food restaurant is often disparaged, and even referred to dismissively, as a McJob rather than a real job.

But business school professor Jerry Newman (2007) went undercover and worked behind the counter at seven fast-food restaurants to discover what really goes on there. His book, *My Secret Life on the McJob,* documents his experience. Newman found, unlike Schossler, that these restaurants have much good alongside the bad. Specifically, he asserted that the employees were honest and hard-working, the management was often impressive, and the jobs required a lot more skill and effort than most people imagined. In the book, Newman cites a pharmaceutical executive who states that a fast-food service job on an applicant's résumé is a plus because it indicates the employee is reliable and can handle pressure.

So what do you think? Are these McJobs and the organizations that offer them still serving a role in the economy and people's careers? Or are they dead-end jobs that typify all that is negative about large bureaucracies? Have you ever worked in one? Would you?

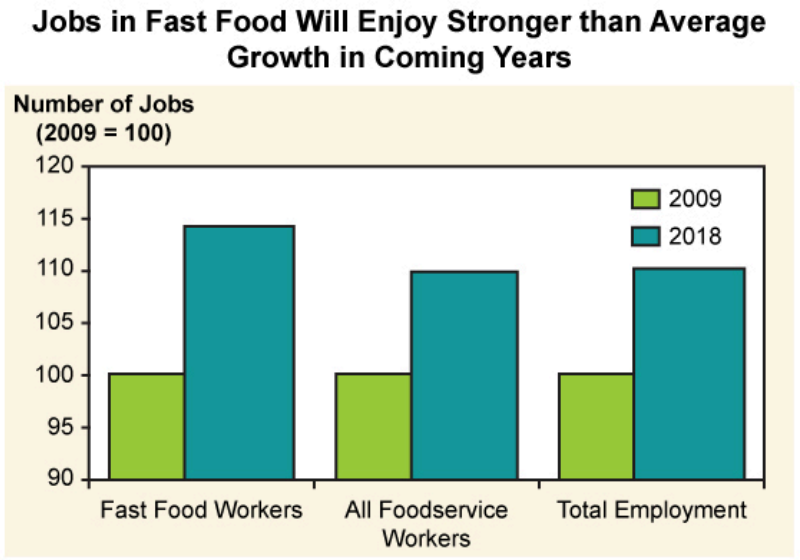


Figure 6.19. Fast-food jobs are expected to grow more quickly than most industries. (Graph courtesy of U.S. Department of Labor)

Summary

We end this chapter with a sociological analysis of the Holocaust to indicate the significance of some of the sociological dynamics of group behaviour. In sociology the group is always more than the sum of its parts. We have examined this with regard to how individuals change their behaviour when they are around others under various circumstances. In chapter 1

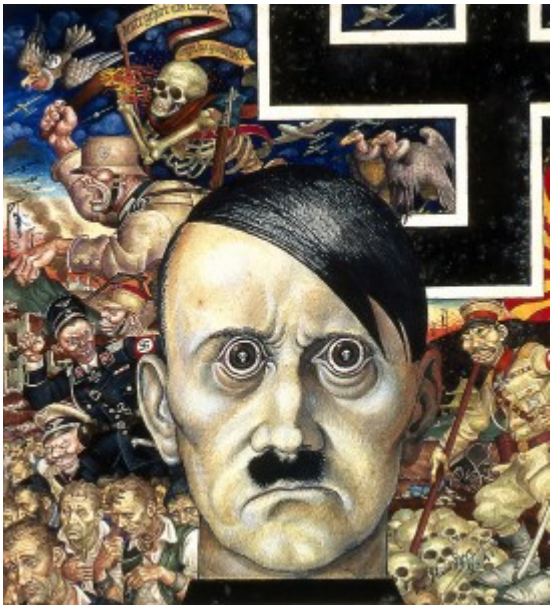


Figure 6.20. Polish-Jewish artist Arthur Szyk (1894-1951). Anti-Christ (1942). (Image courtesy of Wikimedia Commons).

we noted how being in a crowd affected people very differently during the exuberance of the 2010 Vancouver Olympics and the riots of the 2011 Stanley Cup final. In this chapter we have seen how being a member of a **social group** influences people to conform or to choose in-group and out-group attachments. Depending on where one is located in a **social network**, individuals are enabled, to a lesser or greater degree, to share and receive resources of various sorts from friends, friends of friends, and friends of friends of friends, in ways which are also deeply influential. Formal organizations structure the relationships between individuals to be able to achieve organizational goals that individuals could not achieve on their own. How does the insight that the group is more than the sum of the parts help us to understand how the Holocaust was possible?

The Holocaust (literally "whole burnt") refers to the the systematic program of extermination of European Jews and Gypsies (Roma) by Nazis between 1941 and 1945. During this period, it is estimated that 6,000,000 Jews and Gypsies were killed by the Nazis. How was it possible? It is difficult to imagine how this event could merely be the product of isolated individuals entering into interaction. It needs to be understood at the level of group behaviour.

Clearly, a significant minority of the population of Germany in the 1930s were anti-Semitic, but even among these individuals the concept of the Final Solution would have been unthinkable. Often, the explanation that has been put forward is that the Nazi era in 20th century Germany was a temporary aberration, a period of mass irrationality and social breakdown; an imposition of racism, hatred, and violence on the population by a megalomaniacal madman — Adolf Hitler — devoted to world domination. This explanation has an element of truth in that the combination of war reparations imposed on Germany after the First World War, the hyper-inflation of the 1920s, and the onset of a global capitalist crisis in the 1930s (the Great Depression) created conditions of instability and widespread desperation. Desperate people do not think clearly.

However, the sociological analysis of the rise of the Nazis and the implementation of the Holocaust is far more discomforting. The Nazis were democratically elected into power not once but twice (in 1932 and 1933); the suspension of the Weimar constitution and the institution of emergency rule were enacted through legal, constitutional means; the imposition of totalitarian rule and the internment of Jews, Gypsies, homosexuals, the disabled, and political opponents were enabled by the voluntary contributions of ordinary citizens; and perhaps most perplexingly, all of this was accomplished in one of the most modern, cultured, technologically advanced, and rational societies of Europe. Explanations of the behaviour of the perpetrators that relies on the idea that they were sadists, criminals, or madmen have been discredited for lack of evidence. While there were clearly a few individuals in the camps known for their sadistic cruelty, "by conventional

clinical criteria no more than 10 per cent of the SS could be considered 'abnormal'" (Kren and Rappoport, quoted in Bauman, 1989).

As Zygmunt Bauman (1989) has argued, the Holocaust could not have occurred without the existence of modern, rational forms of social organization:

> The Holocaust was not an irrational outflow of the not-yet-fully-eradicated residues of pre-modern barbarity. It was a legitimate resident in the house of modernity; indeed, one who would not be at home in any other house (Bauman, 1989).

Bauman argues in particular that it was the rational, efficient organization of the Nazi bureaucracy which, once the problem of a *Judenfrei* Germany was posed by Hitler — a Germany "free" of Jews — enabled a series of solutions to be examined and rejected before the Final Solution was settled on. Bureaucracy also provided the three conditions which made overcoming individual emotional and moral aversion to the mass killing possible. Firstly, the violence was *authorized* according to correct bureaucratic procedures and hierarchical channels of command. Secondly, the violence was *routinized* by the rule-bound practices and clear division of labour of bureaucratic organization. Thirdly, the victims of the violence were *dehumanized* through, not only ideological propaganda and media spin, but also the impersonality inherent in bureaucracy (Bauman, 1989).

The point is that the Holocaust was the product of the same ordinary sociological phenomena that operate in society today, including the formation of in-groups and out-groups, conformity to structures of authority, groupthink, and the 'rational' structure of bureaucratic organizational forms. Therefore, an answer to the question about how the Holocaust was possible must begin with a study of Simmel's *forms* of collective behaviour. Why do individuals conform to the will of collectivities even when this means overcoming strong personal moral convictions or rational thinking? An answer to this problem is difficult to get at if we begin simply from a micro-level perspective of interpersonal interactions. We need to examine the properties of groups at meso- and macro-levels to understand how the effect of the whole is more than the sum of the individual parts.

Key Terms

aggregate: A collection of people who exist in the same place at the same time, but who don't interact or share a sense of identity.

authoritarian leader: A leader who issues orders and assigns tasks.

bureaucracy: A formal organization characterized by a hierarchy of authority, a clear division of labour, explicit rules, and impersonality.

category: People who share similar characteristics but who are not connected in any way.

clear division of labour: The structuring of work in a bureaucracy such that each individual has a specialized task to perform.

coercive organization: Organization that people do not voluntarily join, such as prison or a mental hospital.

conformity: The extent to which an individual complies with group or societal norms.

contents: The specific drives, needs, purposes, or interests of individuals that motivate them to interact with others.

core discussion group: The group of close, personal contacts with whom one confides on personal matters and with whom one chooses to spend free time.

democratic leader: A leader who encourages group participation and consensus-building before acting.

dyad: A two-member group.

explicit rules: The types of rules in a bureaucracy; rules that are outlined, recorded, and standardized.

expressive function: A group function that serves an emotional need.

expressive leader: A leader who is concerned with process and with ensuring everyone's emotional well-being.

formal organizations: Large, impersonal organizations.

formal sociology: The study of how specific social contents are organized into regular, coordinated social forms.

forms: The patterns of behaviour that guide individuals' actions in different social settings.

glass ceiling: An invisible barrier that prevents women from achieving positions of leadership.

group: Refers to any collection of at least two people who interact with some frequency and who share a sense that their identity is somehow aligned with the group.

groupthink: The tendency to conform to the attitudes and beliefs of the group despite individual misgivings.

hierarchy of authority: A clear chain of command found in a bureaucracy.

ideal type: An abstract model of a recurring social phenomenon that describes the form and logical relation of components.

impersonality: The absence of personal feelings from a professional situation.

in-group: A group a person belongs to and feels is an integral part of his or her identity.

instrumental function: Orientation toward a task or goal.

instrumental leader: A leader who is goal oriented with a primary focus on accomplishing tasks.

iron law of oligarchy: The theory that an organization is ruled by a few elites rather than through collaboration.

laissez-faire leader: A hands-off leader who allows members of the group to make their own decisions.

leadership function: The main focus or goal of a leader.

leadership style: The style a leader uses to achieve goals or elicit action from group members.

McDonaldization: The increasing presence of the fast-food business model in common social institutions.

macro-level of analysis: A research focus on the properties of large scale, society-wide, social interactions.

meso-level of analysis: A research focus on the characteristics of networks, groups, and organizations.

micro-level of analysis: A research focus on the social dynamics of small groups and face-to-face interaction.

meritocracy: A bureaucracy where membership and advancement are based on merit as shown through proven and documented skills.

normative or voluntary organizations: Organizations that people join to pursue shared interests or because they provide intangible rewards.

out-group: A group that an individual is not a member of and may compete with.

primary groups: Small, informal groups of people who are closest to us.

pure sociability: The residual qualities like pleasure that people experience from the mere fact of being together, regardless of the *content* of the interaction.

reference groups: Groups to which an individual compares herself or himself.

secondary groups: Larger and more impersonal groups that are task-focused and time-limited.

social network: A collection of people tied together by a specific configuration of connections.

total institution: An organization in which participants live a controlled life and in which total resocialization occurs.

tragedy of culture: The tendency for cultural creations to detach themselves from lived experience and become increasingly complex, specialized, alienating, or oppressive.

triad: A three-member group.

utilitarian organization: An organization that people join to fill a specific material need.

Section Summary

6.1. How is society possible?

Georg Simmel argues that "there is no such thing as society as such" because "society" is nothing except for the ongoing interactions between individuals at any particular moment. Nevertheless the *forms* of interaction can be analyzed

independently of the *contents* of interaction. Whether at a micro, meso, or macro level of analysis, the whole is more than the sum of its parts.

6.2. Groups

Groups largely define how we think of ourselves. There are two main types of groups: primary and secondary. As the names suggest, the primary group is the long-term, complex one. People use groups as standards of comparison to define themselves—as both who they are and who they are not. Sometimes groups can be used to exclude people or as a tool that strengthens prejudice.

The size and dynamic of a group greatly affects how members act. Primary groups rarely have formal leaders, although there can be informal leadership. Groups generally are considered large when there are too many members for a simultaneous discussion.

In secondary groups, there are two types of leadership functions, with expressive leaders focused on emotional health and wellness, and instrumental leaders more focused on results. Further, there are different leadership styles: democratic leaders, authoritarian leaders, and laissez-faire leaders.

Within a group, conformity is the extent to which people want to go along with the norm. A number of experiments have illustrated how strong the drive to conform can be. It is worth considering real-life examples of how conformity and obedience can lead people to ethically and morally suspect acts.

6.3. Networks

Social networks are collections of people tied together by a specific configuration of connections. The structure and function of the connections determine what the network is capable of and how it influences its members.

6.4. Formal Organizations

Large organizations fall into three main categories: normative/voluntary, coercive, and utilitarian. We live in a time of contradiction: while the pace of change and technology are requiring people to be more nimble and less bureaucratic in their thinking, large bureaucracies like hospitals, schools, and governments are more hampered than ever by their organizational format. At the same time, the past few decades have seen the development of a trend to bureaucratize and conventionalize local institutions. Increasingly, Main Streets across the country resemble each other; instead of a Bob's Coffee Shop and Jane's Hair Salon there is a Dunkin Donuts and a Supercuts. This trend has been referred to as the McDonaldization of society.

Section Quiz

6.1. How is society possible?

1. Which of the following is an example of a social phenomenon that would be best understood at the meso-level of analysis?

    1. The gender differences in facial expressions of couples on first dates.
    2. The impact of social class on voter preference.
    3. The informal networks that form within bureaucratic structures.
    4. The transition effect of new technologies on knowledge transfer between First World and Third World nations.

2. An example of a social *form* would be:

    1. An employment application.
    2. Sexual desire.
    3. A hockey player.
    4. Cooperation.

6.2. Groups

3. What role do secondary groups play in society?

1. They are transactional, task-based, and short-term, filling practical needs.
2. They provide a social network that allows people to compare themselves to others.
3. The members give and receive emotional support.
4. They allow individuals to challenge their beliefs and prejudices.

4. When a high school student gets teased by her basketball team for receiving an academic award, she is dealing with competing _____.

1. Primary groups
2. Out-groups
3. Reference groups
4. Secondary groups

5. Which of the following is NOT an example of an in-group?

1. The Ku Klux Klan
2. A university club
3. A synagogue
4. A high school

6. What is a group whose values, norms, and beliefs come to serve as a standard for one's own behaviour?

1. Secondary group
2. Formal organization
3. Reference group
4. Primary group

7. A parent who is worrying over her teenager's dangerous and self-destructive behaviour and low self-esteem may wish to look at her child's _____.

1. Reference group
2. In-group
3. Out-group
4. All of the above

8. Who is more likely to be an expressive leader?

1. The sales manager of a fast-growing cosmetics company
2. A high school teacher at a youth correctional facility
3. The director of a summer camp for chronically ill children
4. A manager at a fast-food restaurant

9. Which of the following is NOT an appropriate group for democratic leadership?

1. A fire station
2. A college classroom
3. A high school prom committee
4. A homeless shelter

10. In Asch's study on conformity, what contributed to the ability of subjects to resist conforming?

1. A very small group of witnesses
2. The presence of an ally
3. The ability to keep one's answer private
4. All of the above

11. Which type of group leadership has a communication pattern that flows from the top down?

1. Authoritarian
2. Democratic
3. Laissez-faire
4. Expressive

6.3. Networks

12. Two people who have just had a baby have turned from a _____ to a _____.

1. Primary group; secondary group
2. Dyad; triad
3. Couple; family
4. De facto group; nuclear family

6.4. Formal Organizations

13. Which is NOT an example of a normative organization?

1. A book club
2. A church youth group
3. A People for the Ethical Treatment of Animals (PETA) protest group
4. A study hall

14. Which of these is an example of a total institution?

1. Jail
2. High school
3. Political party
4. A gym

15. Why do people join utilitarian organizations?

1. Because they feel an affinity with others there
2. Because they receive a tangible benefit from joining
3. Because they have no choice
4. Because they feel pressured to do so

16. Which of the following is NOT a characteristic of bureaucracies?

1. Coercion to join
2. Hierarchy of authority
3. Explicit rules
4. Division of labour

17. What are some of the intended positive aspects of bureaucracies?

1. Increased productivity
2. Increased efficiency
3. Equal treatment for all
4. All of the above

18. What is an advantage of the McDonaldization of society?

1. There is more variety of goods.
2. There is less theft.
3. There is more worldwide availability of goods.
4. There is more opportunity for businesses.

19. What is a disadvantage of the McDonaldization of society?

1. There is less variety of goods.
2. There is an increased need for employees with postgraduate degrees.
3. There is less competition so prices are higher.
4. There are fewer jobs so unemployment increases.

[Quiz answers at end of chapter]

Short Answer

6.1. How is society possible?

1. Choose an example of a social activity like hockey. How would this activity be approached at a micro, meso, and macro level of analysis?
2. Think of a recent social encounter in which you interacted with one or more people. What purely individual drives, needs, purposes, or interests (i.e., *contents*) drew you together? Can you describe the characteristics of the *form* of the interaction (e.g., cooperation, competition, division of labour, polite, informal, etc.)? Were there a set of implicit rules that structured the encounter? Can you list them?

6.2 Groups

1. How has technology changed your primary groups and secondary groups? Do you have more (and separate) primary groups due to online connectivity? Do you believe that someone, like Levy, can have a true primary group made up of people she has never met? Why or why not?
2. Compare and contrast two different political groups or organizations, such as the Occupy (Canada) and Tea Party movements (in the United States) or one of the Arab Spring uprisings. How do the groups differ in terms of leadership, membership, and activities? How do the group's goals influence participants? Are any of them in-groups (and have they created out-groups)? Explain your answer.
3. The concept of hate crimes has been linked to in-groups and out-groups. Can you think of an example where people have been excluded or tormented due to this kind of group dynamic?
4. Think of a scenario where an authoritarian leadership style would be beneficial. Explain. What are the reasons it would work well? What are the risks?
5. Describe a time you were led by a leader using, in your opinion, a leadership style that didn't suit the situation. When and where was it? What could she or he have done better?

6. Imagine you are in Asch's study. Would you find it difficult to give the correct answer in that scenario? Why or why not? How would you change the study now to improve it?
7. What kind of leader do you tend to be? Do you embrace different leadership styles and functions as the situation changes? Give an example of a time you were in a position of leadership. What function and style did you express?

6.3. Networks

1. From personal experience, describe how the group dynamics between two people changes when a third person joins the group (or vice versa, when one person leaves a group of three). Do your observations corroborate Simmel's analysis of dyads and triads?
2. How often do you get valuable information from a friend? From a friend of a friend? How significant do network connections seem to be in your life, i.e., with regard to your political preferences, your body weight and dietary choices, your life style, etc.?
3. How many friends would you call "close"? How many friends would your parents and grand parents call close? Does this correspond with Marsden's research that the size of one's "core discussion group" decreases as one ages?

6.4 Formal Organizations

1. What do you think about the spotlight on fast-food restaurants? Do you think they contribute to society's ills? Do you believe they provide a needed service? Have you ever worked in a fast-food restaurant? What did you learn?
2. Do you consider today's large companies like General Motors, Amazon, or Facebook to be bureaucracies? Why or why not? Which of the main characteristics of bureaucracies do you see in them? Which are absent?
3. Where do you prefer to shop, eat out, or grab a cup of coffee? Large chains like Walmart or smaller retailers? Starbucks or a local restaurant? What do you base your decisions on? Does this section change how you think about these choices? Why or why not?

Further Research

6.2. Groups

Information about cyberbullying causes and statistics: http://www.statcan.gc.ca/pub/85-002-x/2014001/article/14093-eng.htm#a7.

Take the What is your leadership style? quiz: http://psychology.about.com/qz/Whats-Your-Leadership-Style.

Explore other experiments on conformity: http://openstaxcollege.org/l/Stanford-Prison.

6.3. Networks

If you have a Facebook account, you might be interested in downloading the networking software "Touchgraph" from Christakis and Fowler's website www.Connectedthebook.com to see a visual representation of your own network connections (http://connectedthebook.com/pages/touchgraph.html)

6.4 Formal Organizations

As mentioned above, the concept of McDonaldization is a growing one. The following link discusses this phenomenon further: http://sociology.about.com/od/Works/a/McDonaldization-of-Society.htm.

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Solutions to Section Quiz

1 C, | 2 D, | 3 A, | 4 C, | 5 D, | 6 C, | 7 D, | 8 C, | 9 A, | 10 D, | 11 A, | 12 B, | 13 D, | 14 A, | 15 B, | 16 A, | 17 D, | 18 C, | 19 A, [Return to quiz]

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Figure 6.10. Hayley Wickenheiser celebrates her first CIS goal with her teammates by Canada

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Figure 6.17. (a) Brownie and Cub compare badges by Girl Guides of Canada (https://www.flickr.com/photos/girlguidesofcan/8488348265/in/photolist-dW61da) used under CC BY 2.0 license (https://creativecommons.org/licenses/by/2.0/)

Long Descriptions

Figure 6.7 Long Description: A graph with the x axis representing where a community exists ('online' or 'in real life') and the y axis representing the technology infrastructure ('Do it yourself' or 'hosted'). The Z axis describes the state of tribe at outset ('Scattered' or 'well formed'). Do it yourself online communities start out "scattered". Hosted communities in real life start out "well formed." [Return to Figure 6.7].

Figure 6.14 Long Description: A Hillary Nutcracker: The box says, "Is America ready for this nutcracker?" and "Stainless steel thighs crack the toughest nuts!" [Return to Figure 6.14].

Chapter 7. Deviance, Crime, and Social Control



Figure 7.1. Psychopaths and sociopaths are some of the star deviants in contemporary popular culture. What makes them so appealing as fictional characters? (Photo courtesy of Christian Weber/Flickr)

Learning Objectives

7.1. Deviance and Control

- Define deviance and categorize different types of deviant behaviour.
- Determine why certain behaviours are defined as deviant while others are not.
- Differentiate between different methods of social control.
- Understand social control as forms of government including penal social control, discipline, and risk management.

7.2. Theoretical Perspectives on Deviance

- Describe the functionalist view of deviance in society including social disorganization theory, control theory, and strain theory.
- Define how critical sociology understands the relationship between deviance, crime, and class inequality.
- Explain feminist theory's unique contributions to the critical perspective on crime and deviance.
- Describe the symbolic interactionist approach to deviance, including differential association theory and labelling theory.

7.3. Crime and the Law

- Identify and differentiate between different types of crimes.
- Differentiate the different sources of crime statistics, and examine the falling rate of crime in Canada.

- Examine the overrepresentation of different minorities in the corrections system in Canada.
- Examine alternatives to prison.

Introduction to Deviance, Crime, and Social Control

Psychopaths and sociopaths are some of the favourite "deviants" in contemporary popular culture. From Patrick Bateman in *American Psycho* to Dr. Hannibal Lecter in *The Silence of the Lambs* to Dexter Morgan in *Dexter*, the figure of the dangerous individual who lives among us provides a fascinating fictional figure. Psychopathy and sociopathy both refer to personality disorders that involve anti-social behaviour, diminished empathy, and lack of inhibitions. In clinical analysis, these analytical categories should be distinguished from psychosis, which is a condition involving a debilitating break with reality.

Psychopaths and sociopaths are often able to manage their condition and pass as "normal" citizens, although their capacity for manipulation and cruelty can have devastating consequences for people around them. The term **psychopathy** is often used to emphasize that the source of the disorder is internal, based on psychological, biological, or genetic factors, whereas **sociopathy** is used to emphasize predominant social factors in the disorder: The social or familial sources of its development and the inability to be social or abide by societal rules (Hare, 1999). In this sense sociopathy would be the sociological disease *par excellence*. It entails an incapacity for companionship (*socius*), yet many accounts of sociopaths describe them as being charming, attractively confident, and outgoing (Hare, 1999).

In a modern society characterized by the predominance of secondary rather than primary relationships, the sociopath or psychopath functions, in popular culture at least, as a prime index of contemporary social unease. The sociopath is like the nice neighbour next door who one day "goes off" or is revealed to have had a sinister second life. In many ways the sociopath is a cypher for many of the anxieties we have about the loss of community and living among people we do not know. In this sense, the sociopath is a very modern sort of deviant. Contemporary approaches to psychopathy and sociopathy have focused on biological and genetic causes. This is a tradition that goes back to 19th century positivist approaches to deviance, which attempted to find a biological cause for criminality and other types of deviant behaviour.

Cesare Lombroso (1835–1909), an Italian professor of legal psychiatry, was a key figure in positivist criminology who thought he had isolated specific physiological characteristics of "degeneracy" that could distinguish "born criminals" from normal individuals (Rimke, 2011). In a much more sophisticated way, this was also the premise of James Fallon (b. 1947), a neuroscientist at the University of California. His research involved analyzing brain scans of serial killers. He found that areas of the frontal and temporal lobes associated with empathy, morality, and self-control are "shut off" in serial killers. In turn, this lack of brain activity has been linked with specific genetic markers suggesting that psychopathy or sociopathy was passed down genetically. Fallon's premise was that psychopathy is genetically determined. An individual's genes determine whether they are psychopathic or not (Fallon, 2013).

However, at the same time that Fallon was conducting research on psychopaths, he was studying the brain scans of Alzheimer's patients. In the Alzheimer's study, he discovered a brain scan from a control subject that indicated the symptoms of psychopathy he had seen in the brain scans of serial killers. The scan was taken from a member of his own family. He broke the seal that protected the identity of the subject and discovered it was his own brain scan.

Fallon was a married man who had raised children and held down a demanding career as a successful scientist, and yet the brain scan indicated he was a psychopath. When he researched his own genetic history, he realized that his family tree contained seven alleged murderers including the famous Lizzie Borden (1860–1927) who allegedly killed her father and stepmother in 1892. He began to notice some of his own behaviour patterns as being manipulative, obnoxiously competitive, egocentric, and aggressive, just not in a criminal manner. He decided that he was a "pro-social psychopath" — an individual who lacks true empathy for others but keeps his or her behaviour within acceptable social norms — due to the loving and nurturing family he grew up in. He had to acknowledge that environment, and not just genes, played a significant role in the expression of genetic tendencies (Fallon, 2013).

What can we learn from Fallon's example from a sociological point of view? Firstly, psychopathy and sociopathy are recognized as problematic forms of deviance because of prevalent social anxieties about serial killers as a type of criminal



Figure 7.2. Lizzie Borden was tried but not convicted of the axe murders of her father and stepmother in 1892. The popular rhyme of the time went, "Lizzie Borden took an axe, and gave her mother 40 whacks.When she saw what she had done, she gave her father 41." (Photo courtesy of Wikimedia Commons).

who "lives next door" or "blends in". This is partly because we live in a type of society where we do not know our neighbours well and partly because we are concerned to discover their identifiable traits are otherwise concealed. Secondly, Fallon acknowledged that there is no purely biological or genetic explanation for psychopathy and sociopathy.

Many individuals with the biological and genetic markers of psychopathy are not dangers to society — key to pathological expressions of psychopathy are elements of an individual's social environment and social upbringing (i.e., nurture). Finally, in Fallon's own account, it is difficult to separate the discovery of the aberrant brain scan and the discovery and acknowledgement of his personal traits of psychopathy. Is it clear which came first? He only recognizes the psychopathology in himself after seeing the brain scan. This is the problem of what Ian Hacking calls the "looping effect" (see the discussion of looping effect in 7.1 "Deviance and Control") that affects the sociological study of deviance (2006). In summary, what Fallon's example illustrates is the complexity of the study of social deviance.

7.1. Deviance and Control

What, exactly, is deviance? And what is the relationship between deviance and crime? According to sociologist William Graham Sumner (1840–1910), **deviance** is a violation of established contextual, cultural, or social norms, whether folkways, mores, or codified law (1906). As we learned in Chapter 3, **folkways** are norms based on everyday cultural customs concerning practical matters like how to hold a fork, what type of clothes are appropriate for different situations, or how to greet someone politely. **Mores** are more serious moral injunctions or taboos that are broadly recognized in a society, like the incest taboo. Codified **laws** are norms that are specified in explicit codes and enforced by government bodies. A **crime** is therefore an act of deviance that breaks not only a norm, but a law. Deviance can be as minor as picking one's nose in public or as major as committing murder.



Figure 7.3. Much of the appeal of watching entertainers perform in drag comes from the humour inherent in seeing everyday norms violated. (Photo courtesy of Cassiopeija/ Wikimedia Commons)

John Hagen provides a typology to classify deviant acts in terms of their perceived harmfulness, the degree of consensus concerning the norms violated, and the severity of the response to them (1994). The most serious acts of deviance are **consensus crimes** about which there is near-unanimous public agreement. Acts like murder and sexual assault are generally regarded as morally intolerable, injurious, and subject to harsh penalties. **Conflict crimes** are acts like prostitution or smoking marijuana, which may be illegal but about which there is considerable public disagreement concerning their seriousness. **Social deviations** are acts like abusing serving staff or behaviours arising from mental illness or addiction, which are not illegal in themselves but are widely regarded as serious or harmful. People agree that these behaviours call for institutional intervention. Finally there are **social diversions** like riding skateboards on sidewalks, overly tight leggings, or facial piercings that violate norms in a provocative way but are generally regarded as distasteful, or for some cool, but harmless.

The point is that the question, "What is deviant behaviour?" cannot be answered in a straightforward manner. No act or person is *intrinsically* deviant. This follows from two key insights of the sociological approach to deviance (which distinguish it from moral and legalistic approaches). Firstly, deviance is defined by its social context. To understand why some acts are deviant and some are not, it is necessary to understand what the context is, what the existing rules are, and how these rules came to be established. If the rules change, what counts as deviant also changes. As rules and norms vary across cultures and time, it makes sense that notions of deviance also change.

Fifty years ago, public schools in Canada had strict dress codes that, among other stipulations, often banned women from wearing pants to class. Today, it is socially acceptable for women to wear pants, but less so for men to wear skirts. In a time of war, acts usually considered morally reprehensible, such as taking the life of another, may actually be rewarded. Much of the confusion and ambiguity regarding the use of violence in hockey has to do with the different sets of rules that apply inside and outside the arena. Acts that are acceptable and even encouraged on the ice would be punished with jail time if they occurred on the street.

Whether an act is deviant or not depends on society's definition of that act. Acts are not deviant in themselves. The second sociological insight is that deviance is not an intrinsic (biological or psychological) attribute of individuals, nor of the acts themselves, but a product of social processes. The norms themselves, or the social contexts that determine which acts are deviant or not, are continually defined and redefined through ongoing social processes — political, legal, cultural, etc. One way in which certain activities or people come to be understood and defined as deviant is through the intervention of moral entrepreneurs.

Howard Becker (b. 1928) defined **moral entrepreneurs** as individuals or groups who, in the service of their own interests, publicize and problematize "wrongdoing" and have the power to create and enforce rules to penalize

wrongdoing (1963). Judge Emily Murphy, commonly known today as one of the Famous Five feminist suffragists who fought to have women legally recognized as "persons" (and thereby qualified to hold a position in the Canadian Senate), was a moral entrepreneur instrumental in changing Canada's drug laws. In 1922 she wrote *The Black Candle*, in which she demonized the use of marijuana:

> [Marijuana] has the effect of driving the [user] completely insane. The addict loses all sense of moral responsibility. Addicts to this drug, while under its influence, are immune to pain, and could be severely injured without having any realization of their condition. While in this condition they become raving maniacs and are liable to kill or indulge in any form of violence to other persons, using the most savage methods of cruelty without, as said before, any sense of moral responsibility…. They are dispossessed of their natural and normal will power, and their mentality is that of idiots. If this drug is indulged in to any great extent, it ends in the untimely death of its addict. (Murphy, 1922)

One of the tactics used by moral entrepreneurs is to create a **moral panic** about activities, like marijuana use, that they deem deviant. A moral panic occurs when media-fuelled public fear and overreaction lead authorities to label and repress deviants, which in turn creates a cycle in which more acts of deviance are discovered, more fear is generated, and more suppression enacted. The key insight is that individuals' deviant status is ascribed to them through social processes. Individuals are not born deviant, but become deviant through their interaction with reference groups, institutions, and authorities.

Through social interaction, individuals are labelled deviant or come to recognize themselves as deviant. For example, in ancient Greece, homosexual relationships between older men and young acolytes were a normal component of the teacher-student relationship. Up until the 19th century, the question of who slept with whom was a matter of indifference to the law or customs, except where it related to family alliances through marriage and the transfer of property through inheritance. However, in the 19th century sexuality became a matter of moral, legal, and psychological concern. The homosexual, or "sexual invert," was defined by the emerging psychiatric and biological disciplines as a psychological deviant whose instincts were contrary to nature.

Homosexuality was defined as not simply a matter of sexual desire or the act of sex, but as a dangerous quality that defined the entire personality and moral being of an individual (Foucault, 1980). From that point until the late 1960s, homosexuality was regarded as a deviant, closeted activity that, if exposed, could result in legal prosecution, moral condemnation, ostracism, violent assault, and loss of career. Since then, the LGBTQ rights movement and constitutional protections of civil liberties have reversed many of the attitudes and legal structures that led to the prosecution of gays, lesbians, and transgendered people. The point is that to whatever degree homosexuality has a natural or inborn biological cause, its deviance is the outcome of a social process.

It is not simply a matter of the events that lead authorities to define an activity or category of persons deviant, but of the processes by which individuals come to recognize themselves as deviant. In the process of socialization, there is a "looping effect" (Hacking, 2006). Once a category of deviance has been established and applied to a person, that person begins to define himself or herself in terms of this category and behave accordingly. This influence makes it difficult to define criminals as kinds of person in terms of pre-existing, innate predispositions or individual psychopathologies.

As we will see later in this chapter, it is a central tenet of symbolic interactionist **labelling theory**, that individuals become criminalized through contact with the **criminal justice system** (Becker, 1963). The well-known problem of using imprisonment to respond to criminal offenders is that prison influences individual behaviour and self-understanding, but often not in the way intended. Prisons are agents of socialization. The act of imprisonment itself modifies individual behaviour to make individuals more criminal. When we add to this insight the sociological research into the social characteristics of those who have been arrested or processed by the criminal justice system — variables such as gender, age, race, and class — it is evident that social variables and power structures are key to understanding who chooses a criminal career path.

One of the principle outcomes of these two sociological insights is that a focus on the *social construction* of different social experiences and problems leads to alternative ways of understanding them and responding to them. In the study of crime and deviance, the sociologist often confronts a legacy of entrenched beliefs concerning either the innate biological disposition or the individual psychopathology of persons considered abnormal: the criminal personality, the sexual or

gender "deviant," the disabled or ill person, the addict, or the mentally unstable individual. However, as Ian Hacking observed, even when these beliefs about kinds of persons are products of objective scientific classification, the institutional context of science and expert knowledge is not independent of societal norms, beliefs, and practices (2006).

The process of classifying kinds of people is a social process that Hacking called "making up people" (2006) and Howard Becker called "labelling" (1963). Crime and deviance are social constructs that vary according to the definitions of crime, the forms and effectiveness of policing, the social characteristics of criminals, and the relations of power that structure society. Part of the problem of deviance is that the social process of labelling some kinds of persons or activities as abnormal or deviant limits the type of social responses available. The major issue is not that labels are arbitrary or that it is possible not to use labels at all, but that the choice of label has consequences. Who gets labelled by whom and the way social labels are applied have powerful social repercussions. Therefore, it is necessary to use the sociological imagination to address crime and deviance both at the individual and social levels. With a deeper understanding of the social factors that produce crime and deviance, it becomes possible to develop a set of strategies that might more effectively encourage individuals to change direction.

Making Connections: Sociology in the Real World

Why I Drive a Hearse

When Neil Young left Canada in 1966 to seek his fortune in California as a musician, he was driving his famous 1953 Pontiac hearse "Mort 2." He and Bruce Palmer were driving the hearse in Hollywood when they happened to see Stephen Stills and Richie Furray driving the other way, a fortuitous encounter that led to the formation of the band Buffalo Springfield (McDonough, 2002). Later Young wrote the song *Long May You Run,* which he performed at the closing ceremonies of the 2010 Winter Olympics in Vancouver, as an elegy to his first hearse "Mort".

Rock musicians are often noted for their eccentricities, but is driving a hearse deviant behaviour? When sociologist Todd Schoepflin ran into his childhood friend Bill who drove a hearse, he wondered what effect driving a hearse had on his friend and what effect it might have on others on the road. Would using such a vehicle for everyday errands be considered deviant by most people? Schoepflin interviewed Bill, curious to know why he drove such an unconventional car. Bill had simply been on the lookout for a reliable winter car; on a tight budget, he searched used car ads and stumbled on one for the hearse. The car ran well and the price was right, so he bought it.

Bill admitted that others' reactions to the car had been mixed. His parents were appalled and he received odd stares from his coworkers. A mechanic once refused to work on it, stating that it was "a dead person machine." On the whole, however, Bill received mostly positive reactions. Strangers gave him a thumbs-up on the highway and stopped him in parking lots to chat about his car. His girlfriend loved it; his friends wanted to take it tailgating; and people offered to buy it.

Could it be that driving a hearse isn't really so deviant after all? Schoepflin theorized that, although viewed as outside conventional norms, driving a hearse is such a mild form of deviance that it actually becomes a mark of distinction. Conformists find the choice of vehicle intriguing or appealing, while nonconformists see a fellow oddball to whom they can relate. As one of Bill's friends remarked, "Every guy wants to own a unique car like this and *you* can certainly pull it off." Such anecdotes remind us that although deviance is often viewed as a violation of norms, it's not always viewed in a negative light (Schoepflin, 2011).

Social Control as Sanction

When a person violates a social norm, what happens? A driver caught speeding can receive a speeding ticket. A student who texts in class gets a warning from a professor. An adult belching loudly is avoided. All societies practise **social control**,



Figure 7.4. A hearse with the license plate "LASTRYD." How would you view the owner of this car? (Photo courtesy of Brian Teutsch/Flickr)

the regulation and enforcement of norms. Social control can be defined broadly as an organized action intended to change people's behaviour (Innes, 2003). The underlying goal of social control is to maintain **social order**, an arrangement of practices and behaviours on which society's members base their daily lives. Think of social order as an employee handbook, and social control as the incentives and disincentives used to encourage or oblige employees to follow those rules. When a worker violates a workplace guideline, the manager steps in to enforce the rules.

One means of enforcing rules are through **sanctions**. Sanctions can be positive as well as negative. **Positive sanctions** are rewards given for conforming to norms. A promotion at work is a positive sanction for working hard. **Negative sanctions** are punishments for violating norms. Being arrested is a punishment for shoplifting. Both types of sanctions play a role in social control.

Sociologists also classify sanctions as formal or informal. Although shoplifting, a form of social deviance, may be illegal, there are no laws dictating the proper way to scratch one's nose. That doesn't mean picking your nose in public won't be punished; instead, you will encounter **informal sanctions**. Informal sanctions emerge in face-to-face social interactions. For example, wearing flip-flops to an opera or swearing loudly in church may draw disapproving looks or even verbal reprimands, whereas behaviour that is seen as positive — such as helping an old man carry grocery bags across the street — may receive positive informal reactions, such as a smile or pat on the back.

Formal sanctions, on the other hand, are ways to officially recognize and enforce norm violations. If a student is caught plagiarizing the work of others or cheating on an exam, for example, he or she might be expelled. Someone who speaks inappropriately to the boss could be fired. Someone who commits a crime may be arrested or imprisoned. On the positive side, a soldier who saves a life may receive an official commendation, or a CEO might receive a bonus for increasing the profits of the corporation.

Not all forms of social control are adequately understood through the use of sanctions, however. Donald Black (b. 1941) identified four key styles of social control, each of which defines deviance and the appropriate response to it in a different manner (1976). **Penal social control** functions by prohibiting certain social behaviours and responding to violations with punishment. **Compensatory social control** obliges an offender to pay a victim to compensate for a harm committed. **Therapeutic social control** involves the use of therapy to return individuals to a normal state. **Conciliatory social control** aims to reconcile the parties of a dispute and mutually restore harmony to a social relationship that has been damaged. While penal and compensatory social controls emphasize the use of sanctions, therapeutic and conciliatory social controls emphasize processes of restoration and healing.

Social Control as Government and Discipline

Michel Foucault (1926-1984) notes that from a period of early modernity onward, European society became increasingly concerned with social control as a practice of government (Foucault, 2007). In this sense of the term, government does not simply refer to the activities of the state, but to all the practices by which individuals or organizations seek to govern the



Figure 7.5. Machiavelli: "If an injury has to be done to a man it should be so severe that his vengeance need not be feared." The ruthlessness with which Machiavelli advised the prince to govern his relationships with subjects and rivals has earned its own adjective in common usage: Machiavellian. (Image courtesy of Wikipedia Commons)

behaviour of others or themselves. **Government** refers to the strategies by which one seeks to direct or guide the conduct of another or others. In the 15th and 16th centuries, numerous treatises were written on how to govern and educate children, how to govern the poor and beggars, how to govern a family or an estate, how to govern an army or a city, how to govern a state and run an economy, and how to govern one's own conscience and conduct. These treatises described the burgeoning arts of government, which defined the different ways in which the conduct of individuals or groups might be directed. Niccolo Machiavelli's *The Prince* (1532), which offers advice to the prince on how best to conduct his relationship with his subjects, is the most famous of these treatises.

The common theme in the various arts of governing proposed in early modernity was the extension of Christian monastic practices involving the detailed and continuous government and salvation of souls. The principles of monastic government were applied to a variety of non-monastic areas. People needed to be governed in all aspects of their lives. It was not, however, until the 19th century and the invention of modern institutions like the prison, public school, modern army, asylum, hospital, and factory, that the means for extending government and social control widely through the population were developed.

Foucault describes these modern forms of government as **disciplinary social control** because they each rely on the detailed continuous training, control, and observation of individuals to improve their capabilities: to transform criminals into law abiding citizens, children into educated and productive adults, recruits into disciplined soldiers, patients into healthy people, etc. (1979). Foucault argues that the ideal of discipline as a means of social control is to render individuals docile. That does not mean that they become passive or sheep-like, but that disciplinary training simultaneously increases their abilities, skills, and usefulness while making them more compliant and manipulable.

The chief components of disciplinary social control in modern institutions like the prison and the school are surveillance, normalization, and examination (Foucault, 1979). **Surveillance** refers to the various means used to make the lives and activities of individuals visible to authorities. In 1791, Jeremy Bentham (1748–1832) published his book on the ideal prison, the **panopticon** or "seeing machine." Prisoners' cells would be arranged in a circle around a central observation tower



Figure 7.6. Presidio Modelo prison, Cuba, built between 1926 and 1928 was based on Bentham's panopticon design. (Photo courtesy of Friman/Wikimedia Commons)

where they could be both separated from each other and continually exposed to the view of prison guards. In this way, Bentham proposed, social control could become automatic because prisoners would be induced to monitor and control their own behaviour.

Similarly, in a school classroom, students sit in rows of desks immediately visible to the teacher at the front of the room. In a store, shoppers can be observed through one-way glass or video monitors. Contemporary surveillance expands the capacity for observation using video or electronic forms of surveillance to render the activities of a population visible. London, England holds the dubious honour of being the most surveilled city in the world. The city's "ring of steel" is a security cordon in which over half a million surveillance cameras are used to monitor and record traffic moving in and out of the city centre.

The practice of **normalization** refers to the way in which norms, such as the level of math ability expected from a grade 2 student, are first established and then used to assess, differentiate, and rank individuals according to their abilities (e.g., as an A student, B student, C student, etc.). Individuals' progress in developing their abilities, whether in math skills, good prison behaviour, health outcomes, or other areas, is established through constant comparisons with others and with natural and observable norms. Minor sanctions are used to continuously modify behaviour that does not comply with correct conduct: Rewards are applied for good behaviour and penalties for bad.

Periodic **examinations** through the use of tests in schools, medical examinations in hospitals, inspections in prisons, year-end reviews in the workplace, etc. bring together surveillance and normalization in a way that enables each individual and each individual's abilities to be assessed, documented, and known by authorities. On the basis of examinations, individuals can be subjected to different disciplinary procedures more suited to them. Gifted children might receive an enriched educational program, whereas poorer students might receive remedial lessons.

Foucault describes disciplinary social control as a key mechanism in creating a **normalizing society**. The establishment of norms and the development of disciplinary procedures to correct deviance from norms become increasingly central to the organization and operation of institutions from the 19th century onward. To the degree that "natural" or sociological norms are used to govern our lives more than laws and legal mechanisms, society can be said to be controlled through normalization and disciplinary procedures. Whereas the use of formal laws, **courts**, and the **police** come into play only when laws are broken, disciplinary techniques enable the continuous and ongoing social control of an expanding range of activities in our lives through surveillance, normalization, and examination. While we may never encounter the police for breaking a law, if we work, go to school, or end up in hospital, we are routinely subject to disciplinary control through most of the day.



Figure 7.7. The contents of a needle exchange kit. (Image courtesy of Todd Huffman/Flickr)

Recent types of social control have adopted a model of **risk management** in a variety of areas of problematic behaviour. Risk management refers to interventions designed to reduce the likelihood of undesirable events occurring based on an assessment of probabilities of risk. Unlike the crime and punishment model of penal social sanctions, or the rehabilitation, training, or therapeutic models of disciplinary social control, risk management strategies do not seize hold of individual deviants but attempt to restructure the environment or context of problematic behaviour in order to minimize the risks to the general population.

For example, the public health model for controlling intravenous drug use does not focus on criminalizing drug use or obliging users to rehabilitate themselves to "kick drugs" (O'Malley, 1998). It recognizes that fines or imprisonment do not curtail drug users propensity to continue to use drugs, and that therapeutic rehabilitation of drug use is not only expensive but unlikely to succeed unless drug users are willing to quit. Instead, it calculates the risk of deaths from drug overdoses and the danger to the general population from the transmission of disease (like HIV and hepatitis C) and attempts to modify the riskiest behaviours through targeted interventions. Programs like needle exchanges (designed to prevent the sharing of needles) or safe-injection-sites (designed to provide sanitary conditions for drug injection and immediate medical services for overdoses) do not *prevent* addicts from using drugs but *minimize* the harms resulting from drug use by modifying the environment in which drugs are injected. Reducing risks to public health is the priority of the public health model.

In the case of crime, the **new penology** strategies of social control are also less concerned with criminal responsibility, moral condemnation, or rehabilitative intervention and treatment of individual offenders (Feely & Simon, 1992). Rather, they are concerned with techniques to identify, classify, and manage groupings of offenders sorted by the degree of dangerousness they represent to the general public. In this way, imprisonment is used to incapacitate those who represent a significant risk, whereas probation and various levels of surveillance are used for those who represent a lower risk. Examples include sex offender tracking and monitoring, or the use of electronic monitoring ankle bracelets for low-risk offenders. New penology strategies seek to regulate levels of deviance, not intervene or respond to individual deviants or the social determinants of crime.

Similarly, **situational crime control** redesigns spaces where crimes or deviance could occur to minimize the risk of crimes occurring there (Garland, 1996). Using alarm systems, CCTV surveillance cameras, adding or improving lighting, broadcasting irritating sounds, or making street furniture uncomfortable are all ways of working on the cost/benefit analysis of potential deviants or criminals before they act rather than acting directly on the deviants or criminals themselves.

7.2. Theoretical Perspectives on Deviance

Why does deviance occur? How does it affect a society? Since the early days of sociology, scholars have developed theories attempting to explain what deviance and crime mean to society. These theories can be grouped according to the three major sociological paradigms: functionalism, symbolic interactionism, and conflict theory.



Figure 7.8. Functionalists believe that deviance plays an important role in society and can be used to challenge people's views. Protesters, such as these PETA members, often use this method to draw attention to their cause. (Photo courtesy of David Shankbone/ Flickr)

Functionalism

Sociologists who follow the functionalist approach are concerned with how the different elements of a society contribute to the whole. They view deviance as a key component of a functioning society. Social disorganization theory, strain theory, and **cultural deviance** theory represent three functionalist perspectives on deviance in society.

Émile Durkheim: The Essential Nature of Deviance

Émile Durkheim (1858-1917) believed that deviance is a necessary part of a successful society. One way deviance is functional, he argued, is that it challenges people's present views (1893). For instance, when African American students across the United States participated in "sit-in" protests during the civil rights movement, they challenged society's notions of segregation. Moreover, Durkheim noted, when deviance is punished, it reaffirms currently held social norms, which also contributes to society (1893). Seeing a student given a detention for skipping class reminds other high schoolers that playing hooky isn't allowed and that they, too, could get a detention.

Social Disorganization Theory

Developed by researchers at the University of Chicago in the 1920s and 1930s, **social disorganization theory** asserts that crime is most likely to occur in communities with weak social ties and the absence of social control. In a certain way, this is the opposite of Durkheim's thesis. Rather than deviance being a force that reinforces moral and social solidarity, it is the absence of moral and social solidarity that provides the conditions for social deviance to emerge.

Early Chicago School sociologists used an ecological model to map the zones in Chicago where high levels of social problem were concentrated. During this period, Chicago was experiencing a long period of economic growth, urban expansion, and foreign immigration. They were particularly interested in the **zones of transition** between established working class neighbourhoods and the manufacturing district. The city's poorest residents tended to live in these transitional zones, where there was a mixture of races, immigrant ethnic groups, and non-English languages, and a high rate of influx as people moved in and out. They proposed that these zones were particularly prone to social disorder because the residents had not yet assimilated to the American way of life. When they did assimilate they moved out, making it difficult for a stable social ecology to become established there.

Social disorganization theory points to broad social factors as the cause of deviance. A person is not born a criminal but becomes one over time, often based on factors in his or her social environment. This theme was taken up by Travis Hirschi's (b. 1935) **control theory**. According to Hirschi, social control is directly affected by the strength of social bonds (1969). Many people would be willing to break laws or act in deviant ways to reap the rewards of pleasure, excitement, and profit, etc. if they had the opportunity. Those who do have the opportunity are those who are only weakly controlled by social restrictions. Similar to Durkheim's theory of anomie, deviance is seen to result where feelings



Figure 7.9. Proponents of social disorganization theory believe that individuals who grow up in impoverished areas are more likely to participate in deviant or criminal behaviours. (Photo courtesy of Apollo 1758/Wikimedia Commons)

of disconnection from society predominate. Individuals who believe they are a part of society are less likely to commit crimes against it. Hirschi identified four types of social bonds that connect people to society (1969):

1. *Attachment* measures our connections to others. When we are closely attached to people, we worry about their opinions of us. People conform to society's norms in order to gain approval (and prevent disapproval) from family, friends, and romantic partners.
2. *Commitment* refers to the investments we make in conforming to conventional behaviour. A well-respected local businesswoman who volunteers at her synagogue and is a member of the neighbourhood block organization has more to lose from committing a crime than a woman who does not have a career or ties to the community. There is a cost/benefit calculation in the decision to commit a crime in which the costs of being caught are much higher for some than others.
3. Similarly, levels of *involvement*, or participation in socially legitimate activities, lessen a person's likelihood of deviance. Children who are members of Little League baseball teams have fewer family crises.
4. The final bond, *belief*, is an agreement on common values in society. If a person views social values as beliefs, he or she will conform to them. An environmentalist is more likely to pick up trash in a park because a clean environment is a social value to that person.

An individual who grows up in a poor neighbourhood with high rates of drug use, violence, teenage delinquency, and deprived parenting is more likely to become a criminal than an individual from a wealthy neighbourhood with a good school system and families who are involved positively in the community. The mutual dependencies and complex relationships that form the basis of a healthy "ecosystem" or social control do not get established.

Research into social disorganization theory can greatly influence public policy. For instance, studies have found that children from disadvantaged communities who attend preschool programs that teach basic social skills are significantly less likely to engage in criminal activity. In the same way, the Chicago School sociologists focused their efforts on community programs designed to help assimilate new immigrants into North American culture. However, in proposing that social disorganization is essentially a moral problem — that it is shared moral values that hold communities together and prevent crime and social disorder — questions about economic inequality, racism, and power dynamics do not get asked.

Robert Merton: Strain Theory

Sociologist Robert Merton (1910–2003) agreed that deviance is, in a sense, a *normal* behaviour in a functioning society, but he expanded on Durkheim's ideas by developing **strain theory**, which notes that access to socially acceptable goals plays a part in determining whether a person conforms or deviates.

From birth, we are encouraged to achieve the goal of financial success. A woman who attends business school, receives

her MBA, and goes on to make a million-dollar income as CEO of a company is said to be a success. However, not everyone in our society stands on equal footing. A person may have the socially acceptable goal of financial success but lack a socially acceptable way to reach that goal. According to Merton's theory, an entrepreneur who can not afford to launch his own company may be tempted to embezzle from his employer for start-up funds. The discrepancy between the reality of structural inequality and the high cultural value of economic success creates a strain that has to be resolved by some means. Merton defined five ways that people adapt to this gap between having a socially accepted goal but no socially accepted way to pursue it.

1. *Conformity*: The majority of people in society choose to conform and not to deviate. They pursue their society's valued goals to the extent that they can through socially accepted means.
2. *Innovation*: Those who innovate pursue goals they cannot reach through legitimate means by instead using criminal or deviant means.
3. *Ritualism*: People who ritualize lower their goals until they can reach them through socially acceptable ways. These "social ritualists" focus on conformity to the accepted means of goal attainment while abandoning the distant, unobtainable dream of success.
4. *Retreatism*: Others retreat from the role strain and reject both society's goals and accepted means. Some beggars and street people have withdrawn from society's goal of financial success. They drop out.
5. *Rebellion*: A handful of people rebel, replacing a society's goals and means with their own. Rebels seek to create a greatly modified social structure in which provision would be made for closer correspondence between merit, effort, and reward.

Many youth from poor backgrounds are exposed to the high value placed on material success in capitalist society but face insurmountable odds to achieving it, so turning to illegal means to achieve success is a rational, if deviant, solution.

Critical Sociology

Critical sociology looks to social and economic factors as the causes of crime and deviance. Unlike functionalists, conflict theorists don't see these factors as necessary functions of society, but as evidence of inequality in the system. As a result of inequality, many crimes can be understood as **crimes of accommodation**, or ways in which individuals cope with conditions of oppression (Quinney, 1977). *Predatory crimes* like break and enter, robbery, and drug dealing are often simply economic survival strategies. *Personal crimes* like murder, assault, and sexual assault are products of the stresses and strains of living under stressful conditions of scarcity and deprivation. *Defensive crimes* like economic sabotage, illegal strikes, civil disobedience, and eco-terrorism are direct challenges to social injustice. The analysis of critical sociologists is not meant to excuse or rationalize crime, but to locate its underlying sources at the appropriate level so they can be addressed effectively.

Critical sociologists do not see the normative order and the criminal justice system as simply neutral or "functional" with regard to the collective interests of society. Institutions of normalization and the criminal justice system have to be seen in context as mechanisms that actively maintain the power structure of the political-economic order. The rich, the powerful, and the privileged have unequal influence on who and what gets labelled deviant or criminal, particularly in instances when their privilege is being challenged. As capitalist society is based on the institution of private property, for example, it is not surprising that theft is a major category of crime. By the same token, when street people, addicts, or hippies drop out of society, they are labelled deviant and are subject to police harassment because they have refused to participate in productive labour.

On the other hand, the ruthless and sometimes sociopathic behaviour of many business people and politicians, otherwise regarded as deviant according to the normative codes of society, is often rewarded or regarded with respect. In his book *The Power Elite* (1956), sociologist C. Wright Mills (1916-1962) described the existence of what he dubbed the **power elite**, a small group of wealthy and influential people at the top of society who hold the power and resources. Wealthy executives, politicians, celebrities, and military leaders often have access to national and international power, and in some cases, their decisions affect everyone in society. Because of this, the rules of society are stacked in favour of a privileged few who manipulate them to stay on top. It is these people who decide what is criminal and what is not, and the effects are often felt most by those who have little power. Mills's theories explain why celebrities such as Chris Brown and Paris Hilton, or once-powerful politicians such as Eliot Spitzer and Tom DeLay, can commit crimes with little or no legal retribution.

While functionalist theories often emphasize crime and deviance associated with the underprivileged, there is in fact no clear evidence that crimes are committed disproportionately by the poor or lower classes. There is an established association between the underprivileged and serious **street crimes** like armed robbery or assault, but these do not constitute the majority of crimes in society, nor the most serious crimes in terms of their overall social, personal, and environmental effects. On the other hand, crimes committed by the wealthy and powerful remain an underpunished and costly problem within society. **White-collar** or **corporate crime** refers to crimes committed by corporate employees or owners in the pursuit of profit or other organization goals. They are more difficult to detect because the transactions take place in private and are more difficult to prosecute because the criminals can secure expert legal advice on how to bend the rules.

In the United States it has been estimated that the yearly value of all street crime is roughly 5 percent of the value of corporate crime or "suite crime" (Snider, 1994). Comparable data is not compiled in Canada; however, the Canadian Department of Justice reported that the total value of property stolen or damaged due to property crime in 2008 was an estimated $5.8 billion (Zhang, 2008), which would put the cost of corporate crime at $116 billion (if the same ratio holds true in Canada). For example, Canadians for Tax Fairness estimates that wealthy Canadians have a combined total of $170 billion concealed in untaxed offshore tax havens (Tencer, 2013). "Tax haven use has robbed at least $7.8 billion in tax revenues from Canada" (Howlett, 2013).

PricewaterhouseCoopers reports that 36 percent of Canadian companies were subject to white-collar crime in 2013 (theft, fraud, embezzlement, cybercrime). One in ten lost $5 million or more (McKenna, 2014). Recent high-profile Ponzi scheme and investment frauds run into tens of millions of dollars each, destroying investors' retirement savings. Vincent Lacroix was sentenced to 13 years in prison in 2009 for defrauding investors of $115 million; Earl Jones was sentenced to 11 years in prison in 2010 for defrauding investors of $50 million; Weizhen Tang was sentenced to 6 years in prison in 2013 for defrauding investors of $52 million. These were highly publicized cases in which jail time was demanded by the public (although as nonviolent offenders the perpetrators are eligible for parole after serving one-sixth of their sentence). However, in 2011–2012 prison sentences were nearly twice as likely for the typically lower-class perpetrators of break and enters (59 percent) as they were for typically middle- and upper-class perpetrators of fraud (35 percent) (Boyce, 2013).

This imbalance based on class power can also be put into perspective with respect to homicide rates (Samuelson, 2000). In 2005, there were 658 homicides in Canada recorded by police, an average of 1.8 a day. This is an extremely serious crime, which merits the attention given to it by the criminal justice system. However, in 2005 there were also 1,097 workplace deaths that were, in principle, preventable. Canadians work on average 230 days a year, meaning that there were on average five workplace deaths a day for every working day in 2005 (Sharpe & Hardt, 2006). Estimates from the United States suggest that only one-third of on-the-job deaths and injuries can be attributed to worker carelessness (Samuelson, 2000).

In 2005, 51 percent of the workplace deaths in Canada were due to occupational diseases like cancers from exposure to asbestos (Sharpe & Hardt, 2006). The Ocean Ranger oil rig collapse that killed 84 workers off Newfoundland in 1982 and the Westray Mine explosion that killed 26 workers in Nova Scotia in 1992 were due to design flaws and unsafe working conditions that were known to the owners. However, whereas corporations are prosecuted for regulatory violations governing health and safety, it is rare for corporations or corporate officials to be prosecuted for the consequences of those violations. "For example, a company would be fined for not installing safety bolts in a construction crane, but not prosecuted for the death of several workers who were below the crane when it collapsed (as in a recent case in Western Canada)" (Samuelson, 2000).

Corporate crime is arguably a more serious type of crime than street crime, and yet white-collar criminals are treated relatively leniently. Fines, when they are imposed, are typically absorbed as a cost of doing business and passed on to consumers, and many crimes, from investment fraud to insider trading and price fixing, are simply not prosecuted. From a critical sociology point of view, this is because white-collar crime is committed by elites who are able to use their power and financial resources to evade punishment. Here are some examples:

> 1. In the United States, not a single criminal charge was filed against a corporate executive after the financial mismanagement of the 2008 financial crisis. The American Security and Exchange Commission levied a total of $2.73 billion in fines and out-of-court settlements, but the total cost of the financial crisis was estimated to be between $6 and $14 trillion (Pyke, 2013).

2. In Canada, three Nortel executives were charged by the RCMP's Integrated Market Enforcement Team (IMET) with fraudulently altering accounting procedures in 2002–2003 to make it appear that Nortel was running a profit (thereby triggering salary bonuses for themselves totalling $12 million), but were acquitted in 2013. The accounting procedures were found to inflate the value of the company, but the intent to defraud could not be proven. The RCMP's IMET, implemented in 2003 to fight white-collar crime, managed only 11 convictions over the first nine years of its existence (McFarland & Blackwell, 2013).
3. Enbridge's 20,000-barrel spill of bitumen (tar sands) oil into the Kalamazoo River, Michigan in 2010 was allowed to continue for 17 hours and involved the company twice re-pumping bitumen into the pipeline. The U.S. National Transportation Safety Board report noted that the spill was the result of "pervasive organizational failures," and documents revealed that the pipeline operators were more concerned about getting home for the weekend than solving the problem (Rusnell, 2012). No criminal charges were laid.



Figure 7.10. In the United States, from 1986 until 2010, the punishment for possessing crack, a "poor person's drug," was 100 times stricter than the punishment for cocaine use, a drug favoured by the wealthy. (Photo courtesy of Wikimedia Commons)

Feminist Contributions

Women who are regarded as criminally deviant are often seen as being **doubly deviant**. They have broken the law but they have also broken gender norms about appropriate female behaviour, whereas men's criminal behaviour is seen as consistent with their aggressive, self-assertive character. This double standard also explains the tendency to medicalize women's deviance, to see it as the product of physiological or psychiatric pathology. For example, in the late 19th century, kleptomania was a diagnosis used in legal defences that linked an extreme desire for department store commodities with various forms of female physiological or psychiatric illness. The fact that "good" middle- and upper-class women, who were at that time coincidentally beginning to experience the benefits of independence from men, would turn to stealing in department stores to obtain the new feminine consumer items on display there, could not be explained without resorting to diagnosing the activity as an illness of the "weaker sex" (Kramar, 2011).

Feminist analysis focuses on the way gender inequality influences the opportunities to commit crime and the definition, detection, and prosecution of crime. In part the gender difference revolves around patriarchal attitudes toward women and the disregard for matters considered to be of a private or domestic nature. For example, until 1969 abortion was illegal in Canada, meaning that hundreds of women died or were injured each year when they received illegal abortions (McLaren & McLaren, 1997). It was not until the Supreme Court ruling in 1988 that struck down the law that it was acknowledged that women are capable of making their own choice, in consultation with a doctor, about the procedure. Similarly, until the 1970s two major types of criminal deviance were largely ignored or were difficult to prosecute as crimes: sexual assault and spousal assault.

Through the 1970s, women worked to change the criminal justice system and establish rape crisis centres and battered women's shelters, bringing attention to domestic violence. In 1983 the Criminal Code was amended to replace the crimes of rape and indecent assault with a three-tier structure of sexual assault (ranging from unwanted sexual touching that violates the integrity of the victim to sexual assault with a weapon or threats or causing bodily harm to aggravated sexual assault that results in wounding, maiming, disfiguring, or endangering the life of the victim) (Kong et al., 2003). Holly

Johnson reported that in the mid-1990s, when violence against women began to be surveyed systematically in Canada, 51 percent of Canadian women had been the subject to at least one sexual or physical assault since the age of 16 (1996).

The goal of the amendments was to emphasize that sexual assault is an act of violence, not a sexual act. Previously, rape had been defined as an act that involved penetration and was perpetrated against a woman who was not the wife of the accused. This had excluded spousal sexual assault as a crime and had also exposed women to **secondary victimization** by the criminal justice system when they tried to bring charges. Secondary victimization occurs when the women's own sexual history and her willingness to consent are questioned in the process of laying charges and reaching a conviction, which as feminists pointed out, increased victims' reluctance to lay charges.

In particular, feminists challenged the **twin myths of rape** that were often the subtext of criminal justice proceedings presided over largely by men (Kramar, 2011). The first myth is that women are untrustworthy and tend to lie about assault out of malice toward men, as a way of getting back at them for personal grievances. The second myth, is that women will say no to sexual relations when they really mean yes. Typical of these types of issues was the judge's comment in a Manitoba Court of Appeal case in which a man pleaded guilty to sexually assaulting his twelve- or thirteen-year-old babysitter:

> The girl, of course, could not consent in the legal sense, but nonetheless was a willing participant. She was apparently more sophisticated than many her age and was performing many household tasks including babysitting the accused's children. The accused and his wife were somewhat estranged (as cited in Kramar, 2011).

Because the girl was willing to perform household chores in place of the man's estranged wife, the judge assumed she was also willing to engage in sexual relations. In order to address these types of issue, feminists successfully pressed the Supreme Court to deliver rulings that restricted a defence attorney's access to a victim's medical and counselling records and rules of evidence were changed to prevent a woman's past sexual history being used against her. Consent to sexual discourse was redefined as what a woman actually says or does, not what the man believes to be consent. Feminists also argued that spousal assault was a key component of patriarchal power. Typically it was hidden in the household and largely regarded as a private, domestic matter in which police were reluctant to get involved.

Interestingly women and men report similar rates of spousal violence — in 2009, 6 percent had experienced spousal violence in the previous five years — but women are more likely to experience more severe forms of violence including multiple victimizations and violence leading to physical injury (Sinha, 2013). In order to empower women, feminists pressed lawmakers to develop zero-tolerance policies that would support aggressive policing and prosecution of offenders. These policies oblige police to lay charges in cases of domestic violence when a complaint is made, whether or not the victim wished to proceed with charges (Kramar, 2011).

In 2009, 84 percent of violent spousal incidents reported by women to police resulted in charges being laid. However, according to victimization surveys only 30 percent of actual incidents were reported to police. The majority of women who did not report incidents to the police stated that they dealt with them in another way, felt they were a private matter, or did not think the incidents were important enough to report. A significant proportion, however, did not want anyone to find out (44 percent), did not want their spouse to be arrested (40 percent), or were too afraid of their spouse (19 percent) (Sinha, 2013).

Symbolic Interactionism

Symbolic interactionism is a theoretical approach that can be used to explain how societies and/or social groups come to view behaviours as deviant or conventional. The key component of this approach is to emphasize the social processes through which deviant activities and identities are socially defined and then "lived" as deviant. Social groups and authorities create deviance by first making the rules and then applying them to people who are thereby labelled as outsiders (Becker, 1963). Deviance is not an intrinsic quality of individuals but is created through the social interactions of individuals and various authorities. Deviance is something that, in essence, is learned.

Deviance as Learned Behaviour

In the early 1900s, sociologist Edwin Sutherland (1883-1950) sought to understand how deviant behaviour developed

among people. Since criminology was a young field, he drew on other aspects of sociology including social interactions and group learning (Laub, 2006). His conclusions established **differential association theory**, stating that individuals learn deviant behaviour from those close to them who provide models of and opportunities for deviance. According to Sutherland, deviance is less a personal choice and more a result of differential socialization processes. A tween whose friends are sexually active is more likely to view sexual activity as acceptable.

A classic study of differential association is Howard Becker's (b. 1928) study of marijuana users in the jazz club scene of Chicago in the 1950s (1953). Becker paid his way through graduate studies by performing as a jazz pianist and took the opportunity to study his fellow musicians. He conducted 50 interviews and noted that becoming a marijuana user involved a social process of initiation into a deviant role that could not be accounted for by either the physiological properties of marijuana or the psychological needs (for escape, fantasy, etc.) of the individual. Rather the "career" of the marijuana user involved a sequence of changes in attitude and experience learned through social interactions with experienced users before marijuana could be regularly smoked for pleasure.

Regular marijuana use was a social achievement that required the individual to pass through three distinct stages. Failure to do so meant that the individual would not assume the deviant role as a regular user of marijuana. Firstly, individuals had to learn to smoke marijuana in a way that would produce real effects. Many first-time users do not feel the effects. If they are not shown how to inhale the smoke or how much to smoke, they might not feel the drug had any effect on them. Their "career" might end there if they are not encouraged by others to persist. Secondly, they had to learn to recognize the effects of "being high" and connect them with drug use.

Although people might display different symptoms of intoxication — feeling hungry, elated, rubbery, etc. — they might not recognize them as qualities associated with the marijuana or even recognize them as different at all. Through listening to experienced users talk about their experiences, novices are able to locate the same type of sensations in their own experience and notice something qualitatively different going on. Thirdly, they had to learn how to enjoy the sensations: They had to learn how to define the situation of getting high as pleasurable. Smoking marijuana is not necessarily pleasurable and often involves uncomfortable experiences like loss of control, impaired judgement, distorted perception, and paranoia. Unless the experiences can be redefined as pleasurable, the individual will not become a regular user. Often experienced users are able to coach novices through difficulties and encourage them by telling them they will learn to like it. It is through differential association with a specific set of individuals that a person learns and assumes a deviant role. The role needs to be learned and its value recognized before it can become routine or normal for the individual.

Labelling Theory

Although all of us violate norms from time to time, few people would consider themselves deviant. Often, those who do, however, have gradually come to believe they are deviant because they been labelled "deviant" by society. **Labelling theory** examines the ascribing of a deviant behaviour to another person by members of society. Thus, what is considered deviant is determined not so much by the behaviours themselves or the people who commit them, but by the reactions of others to these behaviours. As a result, what is considered deviant changes over time and can vary significantly across cultures. As Becker put it, "deviance is not a quality of the act the person commits, but rather a consequence of the application by others of rules and sanctions to the offender. The deviant is one to whom the label has successfully been applied; deviant behaviour is behaviour people so label" (1963).

It is important to note that labelling theory does not address the initial motives or reasons for the rule-breaking behaviour, which might be unknowable, but the importance of its social consequences. It does not attempt to answer the questions of why people break the rules or why they are deviant so much as why particular acts or particular individuals are labelled deviant while others are not. How do certain acts get labelled deviant and what are the consequences?

Sociologist Edwin Lemert expanded on the concepts of labelling theory, identifying two types of deviance that affect identity formation. **Primary deviance** is a violation of norms that does not result in any long-term effects on the individual's self-image or interactions with others. Speeding is a deviant act, but receiving a speeding ticket generally does not make others view you as a bad person, nor does it alter your own self-concept. Individuals who engage in primary deviance still maintain a feeling of belonging in society and are likely to continue to conform to norms in the future.

Sometimes, in more extreme cases, primary deviance can morph into secondary deviance. **Secondary deviance** occurs when a person's self-concept and behaviour begin to change after his or her actions are labelled as deviant by members

of society. The person may begin to take on and fulfill the role of a "deviant" as an act of rebellion against the society that has labelled that individual as such. For example, consider a high school student who often cuts class and gets into fights. The student is reprimanded frequently by teachers and school staff, and soon enough, develops a reputation as a "troublemaker." As a result, the student starts acting out even more and breaking more rules, adopting the troublemaker label and embracing this deviant identity.

Secondary deviance can be so strong that it bestows a **master status** on an individual. A master status is a label that describes the chief characteristic of an individual. Some people see themselves primarily as doctors, artists, or grandfathers. Others see themselves as beggars, convicts, or addicts. The criminal justice system is ironically one of the primary agencies of socialization into the criminal "career path." The labels "juvenile delinquent" or "criminal" are not automatically applied to individuals who break the law. A teenager who is picked up by the police for a minor misdemeanour might be labelled as a "good kid" who made a mistake and who then is released after a stern talking to, or he or she might be labelled a juvenile delinquent and processed as a young offender. In the first case, the incident may not make any impression on the teenager's personality or on the way others react to him or her. In the second case, being labelled a juvenile delinquent sets up a set of responses to the teenager by police and authorities that lead to criminal charges, more severe penalties, and a process of socialization into the criminal identity.

In detention in particular, individuals learn how to assume the identity of serious offenders as they interact with hardened, long-term inmates within the prison culture (Wheeler, 1961). The act of imprisonment itself modifies behaviour, to make individuals more criminal. Aaron Cicourel's (b. 1928) research in the 1960s showed how police used their discretionary powers to label rule-breaking teenagers who came from homes where the parents were divorced as juvenile delinquents and to arrest them more frequently than teenagers from "intact homes" (1968). Judges were also found to be more likely to impose harsher penalties on teenagers from divorced families.

Unsurprisingly, Cicourel noted that subsequent research conducted on the social characteristics of teenagers who were charged and processed as juvenile delinquents found that children from divorced families were more likely to be charged and processed. Divorced families were seen as a cause of youth crime. This set up a vicious circle in which the research confirmed the prejudices of police and judges who continued to label, arrest, and convict the children of divorced families disproportionately. The labelling process acted as a self-fulfilling prophecy in which police found what they expected to see.

7.3. Crime and the Law

The sociological study of crime, deviance, and social control is especially important with respect to public policy debates. In 2012 the Conservative government passed the Safe Streets and Communities Act, a controversial piece of legislation because it introduced mandatory minimum sentences for certain drug or sex related offences, restricted the use of conditional sentencing (i.e., non-prison punishments), imposed harsher sentences on certain categories of young offender, reduced the ability for Canadians with a criminal record to receive a pardon, and made it more difficult for Canadians imprisoned abroad to transfer back to a Canadian prison to be near family and support networks. The legislation imposes a mandatory six-month sentence for cultivating six marijuana plants, for example. This followed the Tackling Violent Crime Act passed in 2008, which among other provisions, imposed a mandatory three-year sentence for first-time gun-related offences.

This government policy represented a shift toward a punitive approach to crime control and away from preventive strategies such as drug rehabilitation, prison diversion, and social reintegration programs. Despite the evidence that rates of serious and violent crime have been falling in Canada, and while even some of the most conservative politicians in the United States have begun to reject the punitive approach as an expensive failure, the government pushed the legislation through Parliament. In response to evidence that puts into question the need for more punitive measures of crime control, then Justice Minister Rob Nicholson said, "Unlike the Opposition, we do not use statistics as an excuse not to get tough on criminals. As far as our Government is concerned, one victim of crime is still one too many" (Galloway, 2011). What accounts for the appeal of "get tough on criminals" policies at a time when rates of crime, and violent crime in particular, are falling and are currently at their lowest level since 1972 (Perreault, 2013)? One reason is that violent crime is a form of deviance that lends itself to spectacular media coverage that distorts its actual threat to the public.

Television news broadcasts frequently begin with "chaos news" — crime, accidents, natural disasters — that present an

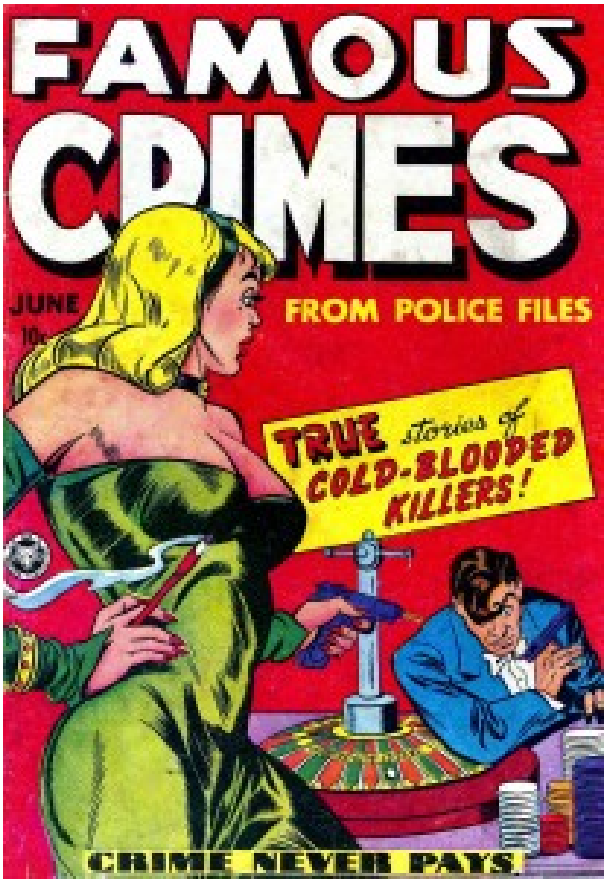


Figure 7.11. How is a crime different from other types of deviance? (Photo courtesy of Fox Features Syndicate/Wikimedia Commons.)

image of society as a dangerous and unpredictable place. However, the image of crime presented in the headlines does not accurately represent the types of crime that actually occur. Whereas the news typically reports on the worst sorts of violent crime, violent crime made up only 21 percent of all police-reported crime in 2012 (down 17 percent from 2002), and homicides made up only one-tenth of 1 percent of all violent crimes in 2012 (down 16 percent from 2002). In 2012, the homicide rate fell to its lowest level since 1966 (Perreault, 2013). Moreover, an analysis of television news reporting on murders in 2000 showed that while 44 percent of CBC news coverage and 48 percent of CTV news coverage focused on murders committed by strangers, only 12 percent of murders in Canada are committed by strangers. Similarly, while 24 percent of the CBC reports and 22 percent of the CTV reports referred to murders in which a gun had been used, only 3.3 percent of all violent crime involved the use of a gun in 1999. In 1999, 71 percent of violent crimes in Canada did not involve any weapon (Miljan, 2001).

This distortion creates the conditions for **moral panics** around crime. As we noted earlier, a moral panic occurs when a relatively minor or atypical situation of deviance arises that is amplified and distorted by the media, police, or members of the public. It thereby comes to be defined as a general threat to the civility or moral fibre of society (Cohen, 1972). As public attention is brought to the situation, more instances are discovered, the deviants are rebranded as "folk devils," and authorities react by taking social control measures disproportionate to the original acts of deviance that began the cycle.

For example, the implementation of mandatory minimum sentences for the cultivation of marijuana is framed in the Safe Streets and Communities legislation as a response to the infiltration of organized crime into Canada. For years newspapers have uncritically published police messaging on grow-ops and the marijuana trade that characterizes the activities as widespread, gang-related, and linked to the cross-border trade in guns and more serious drugs like heroin and cocaine. Television news coverage often shows police in white, disposable hazardous-waste outfits removing marijuana plants from suburban houses, and presents exaggerated estimates of the street value of the drugs. However a Justice

Department study in 2011 revealed that out of a random sample of 500 grow-ops, only 5 percent had connections to organized crime. Moreover, an RCMP-funded study from 2005 noted that "firearms or other hazards" were found in only 6 percent of grow-op cases examined (Boyd & Carter, 2014). While 76 percent of Canadians believe that marijuana should be legally available (Stockwell et al., 2006), and several jurisdictions (Washington and Colorado states, and Uruguay) have legalized marijuana, the Safe Streets and Communities Act appears to be an attempt to reinvigorate the punitive messaging of the "war on drugs" based on disinformation and moral panic around marijuana use and cultivation.

What Is Crime?

Although deviance is a violation of social norms, it is not always punishable, and it is not necessarily bad. Crime, on the other hand, is a behaviour that violates official law and is punishable through formal sanctions. Walking to class backwards is a deviant behaviour. Driving with a blood alcohol percentage over the province's limit is a crime. Like other forms of deviance, however, ambiguity exists concerning what constitutes a crime and whether all crimes are, in fact, "bad" and deserve punishment. For example, in 1946 Viola Desmond refused to sit in the balcony designated for blacks at a cinema in New Glasgow, Nova Scotia, where she was unable to see the screen. She was dragged from the cinema by two men who injured her knee, and she was then arrested, obliged to stay overnight in the male cell block, tried without counsel, and fined.

The courts ignored the issue of racial segregation in Canada. Instead her crime was determined to be tax evasion because she had not paid the 1 cent difference in tax between a balcony ticket and a main floor ticket. She took her case to the Supreme Court of Nova Scotia where she lost. In hindsight, and long after her death, she was posthumously pardoned, because the application of the law was clearly in violation of norms of social equality. As you learned previously, all societies have informal and formal ways of maintaining social control. Within these systems of norms, societies have **legal codes** that maintain formal social control through laws, which are rules adopted and enforced by a political authority. Those who violate these rules incur negative formal sanctions. Normally, punishments are relative to the degree of the crime and the importance to society of the value underlying the law. As we will see, however, there are other factors that influence criminal sentencing.

Types of Crimes

Not all crimes are given equal weight. Society generally socializes its members to view certain crimes as more severe than others. For example, most people would consider murdering someone to be far worse than stealing a wallet and would expect a murderer to be punished more severely than a thief. In modern North American society, crimes are classified as one of two types based on their severity. **Violent crimes** (also known as "crimes against a person") are based on the use of force or the threat of force. Rape, murder, and armed robbery fall under this category. **Nonviolent crimes** involve the destruction or theft of property, but do not use force or the threat of force. Because of this, they are also sometimes called "property crimes." Larceny, car theft, and vandalism are all types of nonviolent crimes. If you use a crowbar to break into a car, you are committing a nonviolent crime; if you mug someone with the crowbar, you are committing a violent crime.

As we noted earlier in the section on critical sociological approaches, when we think of crime, we often picture **street crime**, or offences committed by ordinary people against other people or organizations, usually in public spaces. An often overlooked category is **corporate crime** (also called "suite crime"), or crime committed by white-collar workers in a business environment. Embezzlement, insider trading, and identity theft are all types of corporate crime. Although these types of offences rarely receive the same amount of media coverage as street crimes, they can be far more damaging. The 2008 world economic recession was the ultimate result of a financial collapse triggered by corporate crime. An often-debated third type of crime is **victimless crime**. These are called victimless because the perpetrator is not explicitly harming another person. As opposed to battery or theft, which clearly have a victim, a crime like drinking a beer at age 17 or selling a sexual act do not result in injury to anyone other than the individual who engages in them, although they are illegal. While some claim acts like these are victimless, others argue that they actually do harm society. Prostitution may foster abuse toward women by clients or pimps. Drug use may increase the likelihood of employee absences. Such debates highlight how the deviant and criminal nature of actions develops through ongoing public discussion.

Making Connections: Sociological Research

Hate Crimes

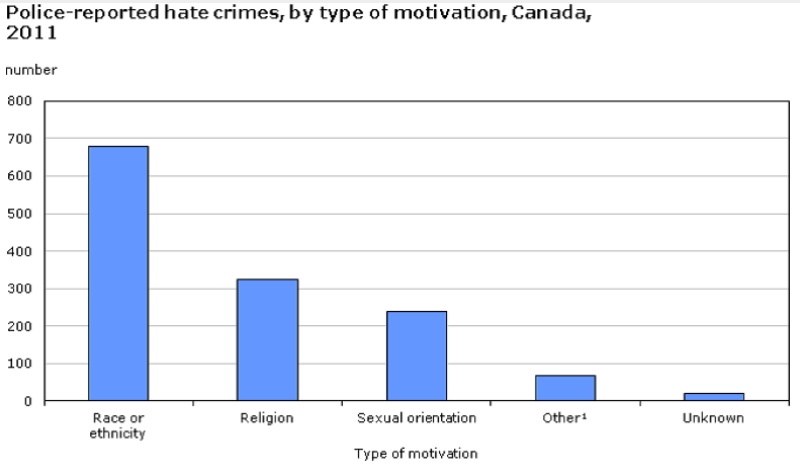


Figure 7.12. In Canada, there were 1,332 reported victims of hate crimes in 2011. The General Social Survey suggests that only one-third of hate motivated incidences are reported to police. [Long Description] (Source: Allen & Boyce, 2013)

In the early morning of January 4, 1998, a 65-year-old Sikh caretaker in Surrey, B.C. was beaten to death in the parking lot of the Guru Nanak Sikh temple by five white-supremacist skinheads, aged 17 to 25, as he was about to open the temple for early morning worship. The skinheads were part of a group that called itself White Power. They had been to an all-night drinking party when they decided they were going to vandalize some cars in the temple parking lot. They encountered the caretaker Nirmal Singh Gill and took turns attacking him. In trial it came out that the eldest of the skinheads had recently been released from the military because of his racist beliefs. Another had a large Nazi flag pinned to the wall of his apartment. In a telephone call intercepted during the investigation that led to the skinheads' arrest, one skinhead was recorded as saying, "Can't go wrong with a Hindu death cause it always sends a f'n message" (*R. v. Miloszewski,* 1999).Attacks motivated by hate based on a person's race, religion, or other characteristics are known as **hate crimes**. The category of hate crimes grew out of the provisions in the Criminal Code that prohibit hate propaganda (sections 318 and 319) including advocating genocide, public incitement of hatred, or the willful promotion of hatred against an identifiable group.In 1996, section 718.2 of the Criminal Code was amended to introduce hate motivation as an aggravating factor in crime that needed to be considered in sentencing (Silver et al., 2004). In 2009 Statistics Canada's *General Social Survey on Victimization* reported that 5 percent of the offences experienced by victims of crime in Canada were believed by the victims to be motivated by hate (approximately 399,000 incidents in total) (Perreault & Brennan, 2010). However, police reported hate crimes totalled only 1,473 incidents in 2009. About one-third of the *General Social Survey* respondents said they reported the hate-motivated incidents to the police. In 2011 police-reported hate crimes had dropped to 1,322 incidents. The majority of these were racially or ethnically motivated, but many were based on religious prejudice (especially anti-Semitic) or sexual orientation. A significant portion of the hate-motivated crimes (50 percent) involved mischief (vandalism, graffiti, and other destruction of property). This figure increased to 75 percent for religious-motivated hate crimes. Violent hate crimes constituted 39 percent of all hate crimes (22 percent accounted for by violent assault specifically). Sexual-orientation-motivated hate crimes were the most likely to be violent (65 percent) (Allen & Boyce, 2013).

Crime Statistics

What crimes are people in Canada most likely to commit, and who is most likely to commit them? To understand criminal statistics, you must first understand how these statistics are collected. Since 1962, Statistics Canada has been collecting and

publishing an archive of crime statistics known as the *Uniform Crime Reports Survey* (UCR). These annual publications contain data from all the police agencies in Canada. Although the UCR contains comprehensive data on police reports, it fails to take into account the fact that many crimes go unreported due to the victims' unwillingness to report them, largely based on fear, shame, or distrust of the police. The accuracy of the data collected by the UCR also varies greatly. Because police and other authorities decide which criminal acts they are going to focus on, the data reflects the priorities of the police rather than actual levels of crime *per se*. For example, if police decide to focus on gun-related crimes, chances are that more gun-related crimes will be discovered and counted.

Similarly, changes in legislation that introduce new crimes or change the categories under which crimes are recorded will also alter the statistics. To address some of these problems, in 1985, Statistics Canada began to publish a separate report known as the *General Social Survey on Victimization* (GSS). The GSS is a self-report study. A **self-report study** is a collection of data acquired using voluntary response methods, based on telephone interviews. In 2014, for example, survey data were gathered from 79,770 households across Canada on the frequency and type of crime they experience in their daily lives. The surveys are thorough, providing a wider scope of information than was previously available. This allows researchers to examine crime from more detailed perspectives and to analyze the data based on factors such as the relationship between victims and offenders, the consequences of the crimes, and substance abuse involved in the crimes. Demographics are also analyzed, such as age, ethnicity, gender, location, and income level.

The GSS reports a higher rate of crime than the UCR, especially for less serious crimes. In the 2009 *GSS on Victimization*, only 31 percent of criminal incidents experienced by respondents were reported to police (Perreault & Brennan, 2010). Though the GSS is a critical source of statistical information, disadvantages exist. "Non-response," or a victim's failure to participate in the survey or a particular question, is among them. Inability to contact important demographics, such as those who do not have access to phones or who frequently relocate, also skews the data. For those who participate, memory issues can be problematic for the data sets. Some victims' recollection of the crimes can be inaccurate or simply forgotten over time.

The Declining Crime Rate in Canada

While neither of these publications can take into account all of the crimes committed in the country, some general trends may be noted. Crime rates were on the rise after 1960, but following an all-time high in the 1980s and 1990s, rates of violent and nonviolent crimes started to decline. In 2012 they reached their lowest level since 1972 (Perreault, 2013).



Figure 7.13. The crime rates for all types of crime in Canada, including violent crime, have been declining since 1992. Why? (Source: Perreault, 2013).

In 2012, approximately 2 million crimes occurred in Canada. Of those, 415,000 were classified as violent crimes, the majority being assault and robbery. The rate of violent crime reached its lowest level since 1987, led by decreases in sexual assault, common assault, and robbery. The homicide rate fell to its lowest level since 1966. An estimated 1.58 million

nonviolent crimes also took place; the most common being theft under $5,000 and mischief. The major contribution to the declining crime rate has been decreases in nonviolent crime, especially decreases in mischief, break-ins, disturbing the peace, theft of a motor vehicle, and possession of stolen property. As noted above, however, only 31 percent of violent and nonviolent crimes were reported to the police.

What accounts for the decreases in the crime rate? Opinion polls continue to show that a majority of Canadians believe that crime rates, especially violent crime rates, are rising (Edmiston, 2012), even though the statistics show a steady decline since 1991. Where is the disconnect? There are three primary reasons for the decline in the crime rate. Firstly, it reflects the demographic changes to the Canadian population. Most crime is committed by people aged 15 to 24. This age cohort has declined in size since 1991. Secondly, male unemployment is highly correlated with the crime rate. Following the recession of 1990–1991, better economic conditions improved male unemployment. Thirdly, police methods have arguably improved since 1991, including having a more targeted approach to particular sites and types of crime. Whereas reporting on spectacular crime has not diminished, the underlying social and policing conditions have. It is very difficult to get a feel for statistical realities when you are sitting in front of a TV screen that shows a daily litany of violent and frightening crime.

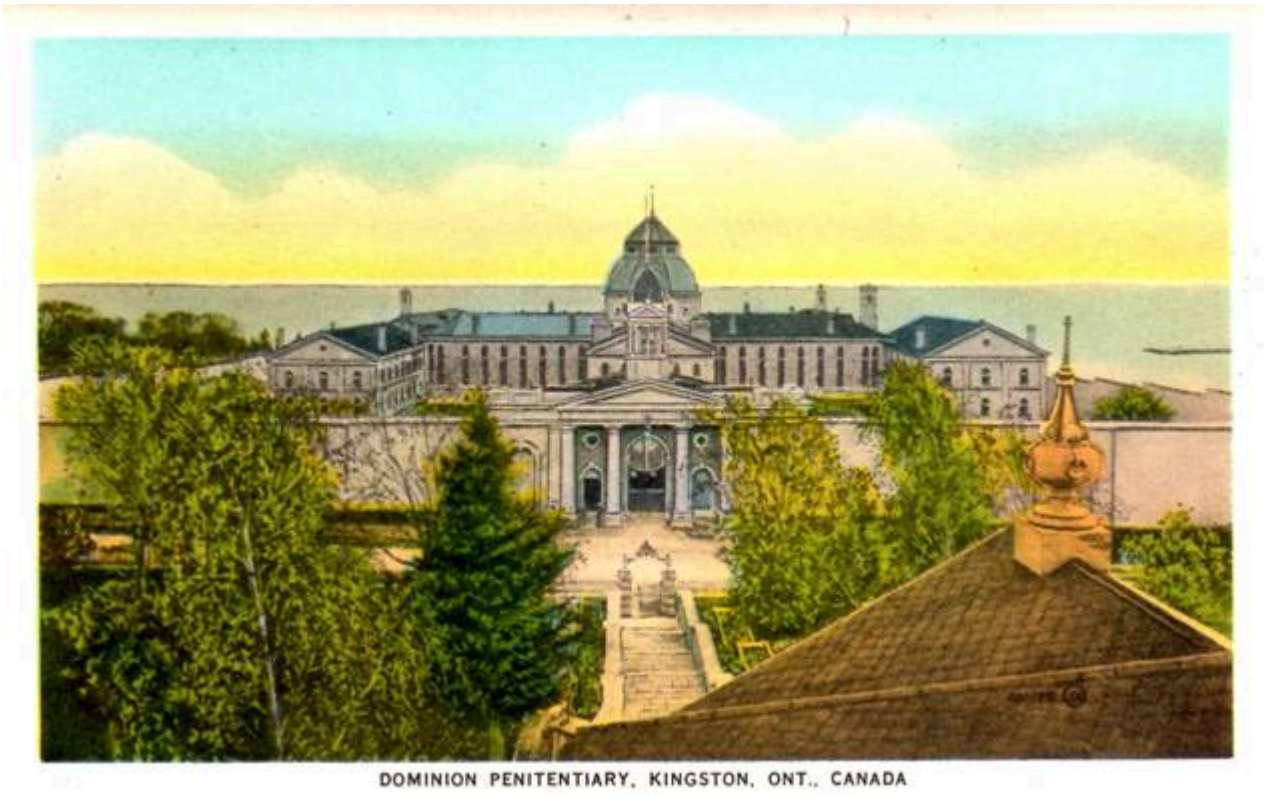


Figure 7.14. Kingston Penitentiary was opened in 1835 and officially closed in 2013. (Photo courtesy of R. Orville Lyttle/Flickr)

Corrections

The **corrections system**, more commonly known as the prison system, is tasked with supervising individuals who have been arrested, convicted, and sentenced for a criminal offence. At the end of 2011, approximately 38,000 adults were in prison in Canada, while another 125,000 were under community supervision or probation (Dauvergne, 2012). By way of contrast, seven million Americans were behind bars in 2010 (Bureau of Justice Statistics, 2011). Canada's rate of adult incarceration in 2011 was 140 per 100,000 population. In the United States in 2008, the incarceration rate was approximately 1,000 per 100,000 population. More than 1 in 100 U.S. adults were in jail or prison, the highest benchmark in U.S. history. While Americans account for 5 percent of the global population, they have 25 percent of the world's inmates, the largest number of prisoners in the world (Liptak, 2008). While Canada's rate of incarceration is far lower than that of the United States, there are nevertheless some disturbing features of the Canadian corrections system.

As we noted in Chapter 1, from 2010 to 2011, Aboriginal Canadians were 10 times more likely to be incarcerated than the non-Aboriginal population. While Aboriginal people accounted for about 4 percent of the Canadian population, in 2013, they made up 23.2 percent of the federal penitentiary population. Aboriginal women made up 33.6 percent of incarcerated women in Canada. This problem of **overrepresentation** of Aboriginal people in the corrections system — the difference between the proportion of Aboriginal people incarcerated in Canadian correctional facilities and their proportion in the general population — continues to grow appreciably despite a Supreme Court ruling in 1999 (R. vs. Gladue) that the social history of Aboriginal offenders should be considered in sentencing. Section 718.2 of the Criminal Code states, "all available sanctions other than imprisonment that are reasonable in the circumstances should be considered for all offenders, with particular attention to the circumstances of Aboriginal offenders." Prison is supposed to be used only as a last resort. Nevertheless, between 2003 and 2013, the Aboriginal population in prison grew by 44 percent (Correctional Investigator Canada, 2013).

Hartnagel summarised the literature on why Aboriginal people are overrepresented in the criminal justice system (2004). Firstly, Aboriginal people are disproportionately poor and poverty is associated with higher arrest and incarceration rates. Unemployment in particular is correlated with higher crime rates. Secondly, Aboriginal lawbreakers tend to commit more detectable street crimes than the less detectable white collar or suite crimes of other segments of the population. Thirdly, the criminal justice system disproportionately profiles and discriminates against Aboriginal people. It is more likely for Aboriginal people to be apprehended, processed, prosecuted, and sentenced than non-Aboriginal people. Fourthly, the legacy of colonization has disrupted and weakened traditional sources of social control in Aboriginal communities. The informal social controls that effectively control criminal and deviant behaviour in intact communities have been compromised in Aboriginal communities due to the effects of forced assimilation, the residential school system, and migration to poor inner city neighbourhoods.

Although black Canadians are a smaller minority of the Canadian population than Aboriginal people, they experience a similar problem of overrepresentation in the prison system. Blacks represent approximately 2.9 percent of the Canadian population, but accounted for 9.5 percent of the total prison population in 2013, up from 6.3 percent in 2003–2004 (Correctional Investigator Canada, 2013). A survey revealed that blacks in Toronto are subject to racial profiling by the police, which might partially explain their higher incarceration rate (Wortley, 2003). **Racial profiling** occurs when police single out a particular racial group for extra policing, including a disproportionate use of stop-and-search practices (i.e. "carding"), undercover sting operations, police patrols in racial minority neighbourhoods, and extra attention at border crossings and airports. Survey respondents revealed that blacks in Toronto were much more likely to be stopped and searched by police than were whites or Asians. Moreover, in a reverse of the situation for whites, older and more affluent black males were more likely to be stopped and searched than younger, lower-income blacks. As one survey respondent put it: "If you are black and drive a nice car, the police think you are a drug dealer or that you stole the car. They always pull you over to check you out" (Wortley, 2003).

Prisons and their Alternatives

Recent public debates in Canada on being "tough on crime" often revolve around the idea that imprisonment and mandatory minimum sentences are effective crime control practices. It seems intuitive that harsher penalties will deter offenders from committing more crimes after their release from prison. However research shows that serving prison time does not reduce the propensity to re-offend after the sentence has been completed. In general the effect of imprisonment on **recidivism** — the likelihood for people to be arrested again after an initial arrest — was either non-existent or actually *increased* the likelihood of re-offence in comparison to non-prison sentences (Nagin, Cullen, & Jonson, 2009). In particular, first time offenders who are sent to prison have higher rates of recidivism than similar offenders sentenced to community service (Nieuwbeerta, Nagin, & Blockland, 2009).

Moreover, the collateral effects of the imprisonment of one family member include negative impacts on the other family members and communities, including increased aggressiveness of young sons (Wildeman, 2010) and increased likelihood that the children of incarcerated fathers will commit offences as adults (van de Rakt & Nieuwbeerta, 2012). Some researchers have spoken about a **penal-welfare complex** to describe the creation of inter-generational criminalized populations who are excluded from participating in society or holding regular jobs on a semi-permanent basis (Garland, 1985). The painful irony for these groups is that the petty crimes like theft, public consumption of alcohol, drug use, etc.

that enable them to get by in the absence of regular sources of security and income are increasingly targeted by zero tolerance and minimum sentencing policies of crime control.

There are a number of alternatives to prison sentences used as criminal sanctions in Canada including fines, electronic monitoring, probation, and community service. These alternatives divert offenders from forms of penal social control, largely on the basis of principles drawn from labelling theory. They emphasize to varying degrees compensatory social control, which obliges an offender to pay a victim to compensate for a harm committed; therapeutic social control, which involves the use of therapy to return individuals to a normal state; and conciliatory social control, which reconciles the parties of a dispute to mutually restore harmony to a social relationship that has been damaged.

Many non-custodial sentences involve **community-based sentencing**, in which offenders serve a conditional sentence in the community, usually by performing some sort of community service. The argument for these types of programs is that rehabilitation is more effective if the offender is in the community rather than prison. A version of community-based sentencing is **restorative justice conferencing**, which focuses on establishing a direct, face-to-face connection between the offender and the victim. The offender is obliged to make restitution to the victim, thus "restoring" a situation of justice. Part of the process of restorative justice is to bring the offender to a position in which he or she can fully acknowledge responsibility for the offence, express remorse, and make a meaningful apology to the victim (Department of Justice, 2013).

In special cases where the parties agree, **Aboriginal sentencing circles** involve victims, the Aboriginal community, and Aboriginal elders in a process of deliberation with Aboriginal offenders to determine the best way to find healing for the harm done to victims and communities. The emphasis is on forms of **traditional Aboriginal justice**, which centre on healing and building community rather than retribution. These might involve specialized counselling or treatment programs, community service under the supervision of elders, or the use of an Aboriginal nation's traditional penalties (Aboriginal Justice Directorate, 2005).

It is difficult to find data in Canada on the effectiveness of these types of programs. However, a large meta-analysis study that examined ten studies from Europe, North America, and Australia was able to determine that restorative justice conferencing was effective in reducing rates of recidivism and in reducing costs to the criminal justice system (Strang et al., 2013). The authors suggest that recidivism was reduced between 7 and 45 percent from traditional penal sentences by using restorative justice conferencing.

Rehabilitation and recidivism are of course not the only goals of the corrections systems. Many people are skeptical about the capacity of offenders to be rehabilitated and see criminal sanctions more importantly as a means of (a) deterrence to prevent crimes, (b) retribution or revenge to address harms to victims and communities, or (c) incapacitation to remove dangerous individuals from society.

Conclusions

The sociological study of crime, deviance, and social control is especially important with respect to public policy debates. The political controversies that surround the question of how best to respond to crime are difficult to resolve at the level of political rhetoric. Often, in the news and public discourse, the issue is framed in moral terms; therefore, for example, the policy alternatives get narrowed to the option of either being "tough" on crime or "soft" on crime. Tough and soft are moral categories that reflect a moral characterization of the issue. A question framed by these types of moral categories cannot be resolved by using evidence-based procedures.

Posing the debate in these terms narrows the range of options available and undermines the ability to raise questions about which responses to crime actually work. In fact policy debates over crime seem especially susceptible to the various forms of specious reasoning described in Chapter 2: Sociological Research ("Science vs. Non-Science"). The story of the isolated individual whose specific crime becomes the basis for the belief that the criminal justice system as a whole has failed illustrates several qualities of unscientific thinking: knowledge based on casual observation, knowledge based on overgeneralization, and knowledge based on selective evidence. Moral categories of judgement pose the problem in terms that are unfalsifiable and non-scientific.

The sociological approach is essentially different. It focuses on the effectiveness of different social control strategies for addressing different types of criminal behaviour and the different types of risk to public safety. Thus, from a sociological point of view, it is crucial to think systematically about who commits crimes and why. Also, it is crucial to look at the big

picture to see why certain acts are considered normal and others deviant, or why certain acts are criminal and others are not. In a society characterized by large inequalities of power and wealth, as well as large inequalities in arrest and incarceration, an important social justice question needs to be examined regarding who gets to define whom as criminal.

Chapter 6 "Deviance, Crime, and Social Control" has illustrated the sociological imagination at work by examining the "individual troubles" of criminal behaviour and victimization within the social structures that sustain them. In this regard, sociology is able to advocate policy options that are neither hard nor soft, but evidence-based and systematic.

Key Terms

Aboriginal sentencing circles: The involvement of Aboriginal communities in the sentencing of Aboriginal offenders.

community-based sentencing: Offenders serve a conditional sentence in the community, usually by performing some sort of community service.

compensatory social control: A means of social control that obliges an offender to pay a victim to compensate for a harm committed.

conciliatory social control: A means of social control that reconciles the parties of a dispute and mutually restores harmony to a social relationship that has been damaged.

consensus crimes: Serious acts of deviance about which there is near-unanimous public agreement.

conflict crimes: Acts of deviance that may be illegal but about which there is considerable public disagreement concerning their seriousness.

control theory: A theory that states social control is directly affected by the strength of social bonds and that deviance results from a feeling of disconnection from society.

corporate crime: Crime committed by white-collar workers in a business environment.

corrections system: The system tasked with supervising individuals who have been arrested, convicted, or sentenced for criminal offences.

court: A system that has the authority to make decisions based on law.

crime: A behaviour that violates official law and is punishable through formal sanctions.

crimes of accommodation: Crimes committed as ways in which individuals cope with conditions of oppression and inequality.

criminal justice system: An organization that exists to enforce a legal code.

critical sociology: Looks to social and economic factors as the causes of crime and deviance.

cultural deviance: Theory that suggests conformity to the prevailing cultural norms of lower-class society causes crime.

deviance: A violation of contextual, cultural, or social norms.

differential association theory: A theory that states individuals learn deviant behaviour from those close to them, who provide models of and opportunities for deviance.

disciplinary social control: Detailed continuous training, control, and observation of individuals to improve their capabilities.

doubly deviant: Women (or other categories of individual) who break both laws and gender (or other) norms.

examination: The use of tests by authorities to assess, document, and know individuals.

folkways: Norms based on everyday cultural customs like etiquette.

formal sanctions: Sanctions that are officially recognized and enforced.

government: Practices by which individuals or organizations seek to govern the behaviour of others or themselves.

hate crimes: Attacks based on a person's race, religion, or other characteristics.

informal sanctions: Sanctions that occur in face-to-face interactions.

labelling theory: The ascribing of a deviant behaviour to another person by members of society.

law: Norms that are specified in explicit codes and enforced by government bodies.

legal codes: Codes that maintain formal social control through laws.

master status: A label that describes the chief characteristic of an individual.

moral entrepreneur: An individual or group who, in the service of its own interests, publicizes and problematizes "wrongdoing" and has the power to create and enforce rules to penalize wrongdoing.

moral panic: An expanding cycle of deviance, media-generated public fears, and police repression.

mores: Serious moral injunctions or taboos that are broadly recognized in a society.

negative sanctions: Punishments for violating norms.

new penology: Strategies of social control that identify, classify, and manage groupings of offenders by the degree of risk they represent to the general public.

nonviolent crimes: Crimes that involve the destruction or theft of property, but do not use force or the threat of force.

normalization: The process by which norms are used to differentiate, rank, and correct individual behaviour.

normalizing society: A society that uses continual observation, discipline, and correction of its subjects to exercise social control.

overrepresentation: The difference between the proportion of an identifiable group in a particular institution (like the correctional system) and their proportion in the general population.

panopticon: Jeremy Bentham's "seeing machine" that became the model for the ideal prison.

penal social control: A means of social control that prohibits certain social behaviours and responds to violations with punishment.

penal-welfare complex: The network of institutions that create and exclude inter-generational, criminalized populations on a semi-permanent basis.

police: A civil force in charge of regulating laws and public order at a federal, state, or community level.

positive sanctions: Rewards given for conforming to norms.

power elite: A small group of wealthy and influential people at the top of society who hold the power and resources.

primary deviance: A violation of norms that does not result in any long-term effects on the individual's self-image or interactions with others.

psychopathy: A personality disorder characterized by anti-social behaviour, diminished empathy, and lack of inhibitions.

racial profiling: The singling out of a particular racial group for extra policing.

recidivism: The likelihood for people to be arrested again after an initial arrest.

restorative justice conferencing: Focuses on establishing a direct, face-to-face connection between the offender and the victim.

sanctions: The means of enforcing rules.

secondary deviance: A change in a person's self-concept and behaviour after his or her actions are labelled as deviant by members of society.

secondary victimization: After an initial victimization, secondary victimization is incurred through criminal justice processes.

self-report study: Collection of data acquired using voluntary response methods, such as questionnaires or telephone interviews.

situational crime control: Strategies of social control that redesign spaces where crimes or deviance could occur to minimize the risk of crimes occurring there.

social control: The regulation and enforcement of norms.

social deviations: Deviant acts that are not illegal but are widely regarded as harmful.

social disorganization theory: Theory that asserts crime occurs in communities with weak social ties and the absence of social control.

social diversions: Acts that violate social norms but are generally regarded as harmless.

social order: An arrangement of practices and behaviours on which society's members base their daily lives.

sociopathy: A personality disorder characterized by anti-social behaviour, diminished empathy, and lack of inhibitions.

strain theory: A theory that addresses the relationship between having socially acceptable goals and having socially acceptable means to reach those goals.

street crime: Crime committed by average people against other people or organizations, usually in public spaces.

surveillance: Various means used to make the lives and activities of individuals visible to authorities.

therapeutic social control: A means of social control that uses therapy to return individuals to a normal state.

traditional Aboriginal justice: Centred on healing and building community rather than retribution.

twin myths of rape: The notion that women lie about sexual assault out of malice toward men and women will say "no" to sexual relations when they really mean "yes".

victimless crime: Activities against the law that do not result in injury to any individual other than the person who engages in them.

violent crimes (also known as "crimes against a person"): Based on the use of force or the threat of force.

white-collar crime: Crimes committed by high status or privileged members of society.

zones of transition: Areas within the city characterized by high levels of migration, social diversity, and social change.

Section Summary

7.1. Deviance and Control

Deviance is a violation of norms. Whether or not something is deviant depends on contextual definitions, the situation, and people's response to the behaviour. Society seeks to limit deviance through the use of sanctions that help maintain a system of social control. In modern normalizing societies, disciplinary social control is a primary governmental strategy of social control.

7.2. Theoretical Perspectives on Deviance

The three major sociological paradigms offer different explanations for the motivation behind deviance and crime. Functionalists point out that deviance is a social necessity since it reinforces norms by reminding people of the consequences of violating them. Violating norms can open society's eyes to injustice in the system. Critical sociologists argue that crime stems from a system of inequality that keeps those with power at the top and those without power at the bottom. Feminist sociologists emphasize that gender inequalities play an important role in determining what types of acts are actually regarded as criminal. Symbolic interactionists focus attention on the socially constructed nature of the labels related to deviance. Crime and deviance are learned from the environment and enforced or discouraged by those around us.

7.3. Crime and the Law

Crime is established by legal codes and upheld by the criminal justice system. The corrections system is the dominant system of criminal punishment but a number of community-based sentencing models offer alternatives that promise more effective outcomes in terms of recidivism. Although crime rates increased throughout most of the 20th century, they have been dropping since their peak in 1991.

Section Quiz

7.1. Deviance and Control

1. Which of the following best describes how deviance is defined?

    1. Deviance is defined by federal, provincial, and local laws.
    2. Deviance's definition is determined by one's religion.
    3. Deviance occurs whenever someone else is harmed by an action.
    4. Deviance is socially defined.

2. In 1946, Viola Desmond was arrested for refusing to sit in the blacks-only section of the cinema in Nova Scotia. This is an example of_____.

    1. A consensus crime
    2. A conflict crime
    3. A social deviation
    4. A social diversion

3. A student has a habit of texting during class. One day, the professor stops his lecture and asks her to respect the other students in the class by turning off her phone. In this situation, the professor used _____ to maintain social control.

    1. Informal positive sanctions
    2. Formal negative sanction
    3. Informal negative sanctions
    4. Formal positive sanctions

4. Societies practise social control to maintain _____.

    1. Formal sanctions
    2. Social order
    3. Cultural deviance
    4. Sanction labelling

5. School discipline obliges students to sit in rows and listen to lessons quietly in order for them to learn. This strategy of education demonstrates_____.

    1. Compensatory social control
    2. Formal sanctions
    3. Docility
    4. Positive sanctions

7.2. Theoretical Perspectives on Deviance

6. A student wakes up late and realizes her sociology exam starts in five minutes. She jumps into her car and speeds down the road, where she is pulled over by a police officer. The student explains that she is running late, and the officer lets her off with a warning. The student's actions are an example of _____.

    1. Primary deviance
    2. Positive deviance
    3. Secondary deviance

4. Master deviance

7. According to critical sociology, which of the following people is most likely to commit a crime of accommodation?

1. A student struggling to get better grades
2. An addict who sees a stack of CDs in an unlocked car
3. A professor who is tempted to publish someone else's work as his own
4. A mechanic who dislikes a customer

8. According to social disorganization theory, where is crime most likely to occur?

1. A community where neighbours don't know each other very well
2. A neighbourhood with mostly elderly citizens
3. A city with a large minority population
4. A college campus with students who are very competitive

9. Symbolic interactionists argue that crime is linked primarily to _____.

1. Power
2. Master status
3. Family values
4. Wealth

10. According to the concept of the power elite, why would a celebrity such as Charlie Sheen commit a crime?

1. His parents committed similar crimes
2. His fame protects him from retribution
3. His fame disconnects him from society
4. He is challenging socially accepted norms

11. A convicted sexual offender is released on parole and arrested two weeks later for repeated sexual crimes. How would labelling theory explain this?

1. The offender has been labelled deviant by society and has accepted this master status.
2. The offender has returned to his old neighbourhood and so re-established his former habits.
3. The offender has lost the social bonds he made in prison and feels disconnected from society.
4. The offender is poor and coping with conditions of oppression and inequality.

12. _____ deviance is a violation of norms that _____ result in a person being labelled a deviant.

1. Secondary; does not
2. Negative; does
3. Primary; does not
4. Primary; may or may not

7.3. Crime and the Law

13. Which of the following is an example of corporate crime?

1. Embezzlement
2. Larceny

3. Assault
4. Burglary

14. Spousal abuse is an example of a _____.

1. Street crime
2. Corporate crime
3. Violent crime
4. Nonviolent crime

15. Which of the following situations best describes crime trends in Canada?

1. Rates of violent and nonviolent crimes are decreasing.
2. Rates of violent crimes are decreasing, but there are more nonviolent crimes now than ever before.
3. Crime rates have skyrocketed since the 1970s due to lax court rulings.
4. Rates of street crime have gone up, but corporate crime has gone down.

16. What is a disadvantage of crime victimization surveys?

1. They do not include demographic data, such as age or gender.
2. They may be unable to reach important groups, such as those without phones.
3. They do not address the relationship between the criminal and the victim.
4. They only include information collected by police officers.

[Quiz answers at end of chapter]

Short Answer

7.1. Deviance and Control

1. If given the choice, would you purchase an unusual car such as a hearse for everyday use? How would your friends, family, or significant other react? Since deviance is culturally defined, most of the decisions we make are dependent on the reactions of others. Is there anything the people in your life encourage you to do that you don't do? Why do you resist their encouragement?
2. Think of a recent time when you used informal negative sanctions. To what act of deviance were you responding? How did your actions affect the deviant person or persons? How did your reaction help maintain social control?

7.2. Theoretical Perspectives on Deviance

1. Pick a famous politician, business leader, or celebrity who has been arrested recently. What crime did he or she allegedly commit? Who was the victim? Explain his or her actions from the point of view of one of the major sociological paradigms. What factors best explain how this person might be punished if convicted of the crime?
2. If we assume that the power elite's status is always passed down from generation to generation, how would Edwin Sutherland explain these patterns of power through differential association theory? What crimes do these elite few get away with?

7.3. Crime and the Law

1. Recall the crime statistics presented in this chapter. Do they surprise you? Are these statistics represented accurately in the media? Why does the public perceive that crime rates are increasing and believe that punishment should be stricter when actual crime rates have been steadily decreasing?

Further Research

7.1. Deviance and Control

Although we rarely think of it in this way, deviance can have a positive effect on society. Check out the Positive Deviance Initiative, a program initiated by Tufts University to promote social movements around the world that strive to improve people's lives: http://www.positivedeviance.org/.

7.2. Theoretical Perspectives on Deviance

The Vancouver safe injection site is a controversial strategy to address the public health concerns associated with intravenous drug use. Read about the perspectives that promote and critique the safe injection site model at the following websites. Can you determine how the positions expressed by the different sides of the issue fit within the different sociological perspectives on deviance? What is the best way to deal with the problems of addiction?

- City of Vancouver's "Four Pillars Drug Strategy": http://vancouver.ca/people-programs/four-pillars-drug-strategy.aspx
- Health Officers Council of British Columbia, "A Public Health Approach to Drug Control in Canada" [PDF]: http://www.cfdp.ca/bchoc.pdf
- Drug Prevention Network of Canada: http://www.dpnoc.ca/
- Centre for Addictions Research of B.C. (CARBC): http://www.uvic.ca/research/centres/carbc/

7.3. Crime and the Law

How is crime data collected in Canada? Read about the victimization survey used by Statistics Canada and take the survey yourself: http://www23.statcan.gc.ca/imdb/p2SV.pl?Function=getSurvey&SDDS=4504.

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Solutions to Section Quiz

1 D, | 2 B, | 3 A, | 4 B, | 5 C, | 6 A, | 7 B, | 8 A, | 9 D, | 10 B, | 11 A, | 12 C, | 13 A, | 14 C, | 15 A, | 16 B, [Return to Quiz]

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Long Descriptions

Figure 7.12 Long Description: Police Reported Hate Crimes, by type of motivation, in Canada, 2011

Type of Hate Crime	Number reported to Police
Race or Ethnicity	690
Religion	315
Sexual Orientation	235
Other	80
Unknown	10

[Return to Figure 7.12]

Chapter 9. Social Inequality in Canada



Figure 9.1. The car a person drives can be seen as a symbol of money and power. What does a Rolls-Royce signify about its owner? Why? (Photo courtesy of dave_7/Flickr)

Learning Objectives

9.1. What Is Social Inequality?

- Break the concept of social inequality into its component parts: social differentiation, social stratification, and social distributions of wealth, income, power, and status.
- Define the difference between equality of opportunity and equality of condition.
- Distinguish between caste and class systems.
- Distinguish between class and status.
- Identify the structural basis for the different classes that exist in capitalist societies.

9.2. Social Inequality and Mobility in Canada

- Define the difference between relative and absolute poverty.
- Describe the current trend of increasing inequalities of wealth and income in Canada.
- Distinguish the the differences between Marx's and Weber's definitions of social class and explain why they are significant.
- Characterize the social conditions of the owning class, the middle class, and the traditional working class in Canada.
- Apply the research on social mobility to the question of whether Canada is a meritocracy.
- Recognize cultural markers that are used to display class identity.

9.3. Global Stratification and Inequality

- Define global inequality.
- Describe different sociological models for understanding global inequality.
- Understand how sociological studies identify worldwide inequalities.

9.4. Theoretical Perspectives on Social Inequality

- Understand and apply functionalist, critical sociological and interpretive perspectives on social inequality.

Introduction to Social Inequality in Canada



Figure 9.2. The Ted Rogers statue with Ted Rogers Centre for Heart Research in the background. Who gets monumentalized in Canada, and who gets forgotten? (Image courtesy of Oaktree/Wikimedia Commons)

When he died in 2008, Ted Rogers Jr., then CEO of Rogers Communications, was the fifth-wealthiest individual in Canada, holding assets worth $5.7 billion. In his autobiography (2008) he credited his success to a willingness to take risks, work hard, bend the rules, be on the constant look-out for opportunities, and be dedicated to building the business. In many respects, he saw himself as a self-made billionaire who started from scratch, seized opportunities, and created a business through his own initiative.

The story of Ted Rogers is not exactly a rags to riches one, however. His grandfather, Albert Rogers, was a director of Imperial Oil (Esso) and his father, Ted Sr., became wealthy when he invented an alternating current vacuum tube for radios in 1925. Ted Rogers Sr. went from this invention to manufacturing radios, owning a radio station, and acquiring a licence for TV broadcasting.

However, Ted Sr. died when Ted Jr. was five years old, and the family businesses were sold. His mother took Ted Jr. aside when he was eight and told him, "Ted, your business is to get the family name back" (Rogers, 2008). The family was still wealthy enough to send him to Upper Canada College, the famous private school that also educated the children from the Black, Eaton, Thompson, and Weston families. Ted seized the opportunity at Upper Canada to make money as a bookie, taking bets on horse racing from the other students. Then he attended Osgoode Hall Law School, where reportedly his secretary went to classes and took notes for him. He bought an early FM radio station when he was still in university

and started in cable TV in the mid-1960s. By the time of his death, Rogers Communications was worth $25 billion. At that time just three families, the Rogers, Shaws, and Péladeaus, owned much of the cable service in Canada.

At the other end of the spectrum are the Aboriginal gang members in the Saskatchewan Correctional Centre who we discussed in Chapter 1 (CBC, 2010). The CBC program noted that 85 percent of the inmates in the prison were of Aboriginal descent, half of whom were involved in Aboriginal gangs. Moreover the statistical profile of Aboriginal youth in Saskatchewan is grim, with Aboriginal people making up the highest number of high school dropouts, domestic abuse victims, drug dependencies, and child poverty backgrounds. In some respects the Aboriginal gang members interviewed were like Ted Rogers in that they were willing to seize opportunities, take risks, bend rules, and apply themselves to their vocations. They too aspired to getting the money that would give them the freedom to make their own lives. However, as one of the inmates put it, "the only job I ever had was selling drugs" (CBC, 2010). The consequence of that was to fall into a lifestyle that led to joining a gang, being kicked out of school, developing issues with addiction, and eventually getting arrested and incarcerated. Unlike Ted Rogers, however, the inmate added, "I didn't grow up with the best life" (CBC, 2010).

How do we make sense of the divergent stories? Canada is supposed to be a country in which individuals can work hard to get ahead. It is an "open" society. There are no formal or explicit class, gender, racial, ethnic, geographical, or other boundaries that prevent people from rising to the top. People are free to make choices. But does this adequately explain the difference in life chances that divide the fortunes of the Aboriginal youth from those of the Rogers family? What determines a person's social standing? And how does social standing direct or limit a person's choices?

The French sociologist Pierre Bourdieu (1930-2002) defined ones **habitus** as the deeply seated schemas, habits, feelings, dispositions, and forms of know-how that people hold due to their specific social backgrounds, cultures, and life experiences (1990). Bourdieu referred to it as ones "feel for the game," to use a sports metaphor. Choices are perhaps always "free" in some formal sense, but they are also always situated within one's habitus. The Aboriginal gang members display a certain amount of street smarts that enable them to survive and successfully navigate their world. Street smarts define their habitus and exercise a profound influence over the range of options that are available for them to consider — the neighborhoods they know to avoid, the body languages that signal danger, the values of illicit goods, the motives of different street actors, the routines of police interactions, etc. The habitus affects both the options to conform to the group they identify with or deviate from it. Ted Rogers occupied a different habitus which established a fundamentally different set of options for him in his life path. How are the different lifeworlds or habitus distributed in society so that some reinforce patterns of deprivation while others provide the basis for access to wealth and power?

As Bourdieu pointed out, habitus is so deeply ingrained that we take its reality as natural rather than as a product of social circumstances. This has the unfortunate effect of justifying social inequalites based the belief that the Ted Rogers of the world were naturally gifted and predisposed for success when in fact it is success itself that is "predisposed" by underlying structures of power and privilege.

9.1. What Is Social Inequality?

Sociologists use the term **social inequality** to describe the unequal distribution of valued resources, rewards, and positions in a society. Key to the concept is the notion of **social differentiation**. Social characteristics — differences, identities, and roles — are used to differentiate people and divide them into different categories, which have implications for social inequality. Social differentiation by itself does not necessarily imply a division of individuals into a hierarchy of rank, privilege, and power. However, when a social category like class, occupation, gender, or race puts people in a position in which they can claim a greater share of resources or services, then social differentiation becomes the basis of social inequality.

The term **social stratification** refers to an institutionalized system of social inequality. It refers to a situation in which the divisions and relationships of social inequality have solidified into a system that determines who gets what, when, and why. You may remember the word "stratification" from geology class. The distinct horizontal layers found in rock, called "strata," are a good way to visualize social structure. Society's layers are made of people, and society's resources are distributed unevenly throughout the layers. The people who have more resources represent the top layer of the social structure of stratification. Other groups of people, with progressively fewer and fewer resources, represent the lower layers of our society. Social stratification assigns people to socioeconomic strata based on factors like wealth, income, race,



Figure 9.3. In the upper echelons of the working world, people with the most power reach the top. These people make the decisions and earn the most money. The majority of Canadians will never see the view from the top. (Photo courtesy of Alex Proimos/ Flickr)

education, and power. The question for sociologists is how systems of stratification come to be formed. What is the basis of systematic social inequality in society?

In Canada, the dominant ideological presumption about social inequality is that everyone has an equal chance at success. This is the belief in **equality of opportunity**, which can be contrasted with the concept of **equality of condition**. Equality of condition is the situation in which everyone in a society has a similar level of wealth, status, and power. Although degrees of equality of condition vary markedly in modern societies, it is clear that even the most egalitarian societies today have considerable degrees of *inequality* of condition. Equality of opportunity, on the other hand, is the idea that everyone has an equal possibility of becoming successful. It exists when people have the same chance to pursue economic or social rewards. This is often seen as a function of equal access to education, **meritocracy** (where individual merit determines social standing), and formal or informal measures to eliminate social discrimination. Ultimately, equality of opportunity means that inequalities of condition are not so great that they greatly hamper a person's life chances. Whether Canada is a society characterized by equality of opportunity or not is a subject of considerable sociological debate.

To a certain extent, Ted Rogers' story illustrates the belief in equality of opportunity. His personal narrative is one in which hard work and talent — not inherent privilege, birthright, prejudicial treatment, or societal values — determined his social rank. This emphasis on self-effort is based on the belief that people individually control their own social standing, which is a key piece in the idea of equality of opportunity. Most people connect inequalities of wealth, status, and power to the individual characteristics of those who succeed or fail. The story of the Aboriginal gang members, although it is also a story of personal choices, casts that belief into doubt. It is clear that the type of choices available to the Aboriginal gang members are of a different range and quality than those available to the Rogers family. The available choices are a product of habitus.

Sociologists recognize that social stratification is a society-wide system that makes inequalities apparent. While there are always inequalities between individuals, sociologists are interested in larger social patterns. Social inequality is not about individual inequalities, but about systematic inequalities based on group membership, class, gender, ethnicity, and other variables that structure access to rewards and status. In other words, sociologists are interested in examining the structural conditions of social inequality. There are of course differences in individuals' abilities and talents that will affect their life chances. The larger question, however, is how inequality becomes systematically structured in economic, social, and political life. In terms of individual ability: Who gets the opportunities to develop their abilities and talents, and who does not? Where does "ability" or "talent" come from? As we live in a society that emphasizes the individual — i.e., individual



Figure 9.4. Strata in rock illustrate social stratification. People are sorted, or layered, into social categories. Many factors determine a person's social standing, such as income, education, occupation, age, race, gender, and even physical abilities. (Photo courtesy of Just a Prairie Boy/Flickr)

effort, individual morality, individual choice, individual responsibility, individual talent, etc. — it is often difficult to see the way in which life chances are socially structured.

Factors that define stratification vary in different societies. In most modern societies, stratification is often indicated by differences in **wealth**, the net value of money and assets a person has, and **income**, a person's wages, salary, or investment dividends. It can also be defined by differences in **power** (how many people a person must take orders from versus how many people a person can give orders to) and **status** (the degree of honour or prestige one has in the eyes of others). These four factors create a complex amalgam that defines individuals' social standing within a hierarchy.

Usually the four factors coincide, as in the case of corporate CEOs, like Ted Rogers, at the top of the hierarchy—wealthy, powerful, and prestigious — and the Aboriginal offenders at the bottom — poor, powerless, and abject. Sociologists use the term **status consistency** to describe the consistency of an individual's rank across these factors. However, we can also think of someone like the Canadian prime minister who ranks high in power, but with a salary of approximately $320,000 earns much less than comparable executives in the private sector (albeit eight times the average Canadian salary). The prime minister's status or prestige also rises and falls with the vagaries of politics. The Nam-Boyd scale of status ranks politicians at 66/100, the same status as cable TV technicians (Boyd, 2008). There is status inconsistency in the prime minister's position. Similarly, teachers often have high levels of education, which give them high status (92/100 according to the Nam-Boyd scale), but they receive relatively low pay. Many believe that teaching is a noble profession, so teachers should do their jobs for love of their profession and the good of their students, not for money. Yet no successful executive or entrepreneur



Figure 9.5. The people who live in these houses most likely share similar levels of income and education. Neighbourhoods often house people of the same social standing. Wealthy families do not typically live next door to poorer families, though this varies depending on the particular city and country. (Photo courtesy of Orin Zebest/Flickr)

would embrace that attitude in the business world, where profits are valued as a driving force. Cultural attitudes and beliefs like these support and perpetuate social inequalities.

Systems of Stratification

Sociologists distinguish between two types of systems of stratification. Closed systems accommodate little change in social position. They do not allow people to shift levels and do not permit social relations between levels. Open systems, which are based on achievement, allow movement and interaction between layers and classes. Different systems reflect, emphasize, and foster certain cultural values, and shape individual beliefs. This difference in stratification systems can be examined by the comparison between class systems and caste systems.

The Caste System

Caste systems are closed stratification systems in which people can do little or nothing to change their social standing. A **caste system** is one in which people are born into their social standing and remain in it their whole lives. It is based on fixed or rigid **status** distinctions, rather than economic classes *per se*. As we noted above, status is defined by the level of honour or prestige one receives by virtue of membership in a group. Sociologists make a distinction between **ascribed status —** a status one receives by virtue of being born into a category or group (e.g., hereditary position, gender, race, etc.) **—**and **achieved status —** a status one receives through individual effort or merits (e.g., occupation, educational level, moral character, etc.). Caste systems are based on a hierarchy of ascribed statuses, based on being born into fixed caste groups.

In a caste system, therefore, people are assigned roles regardless of their talents, interests, or potential. Marriage is **endogamous**, meaning that marriage between castes is forbidden. An **exogamous marriage** is a union of people from different social categories. There are virtually no opportunities to improve one's social position. Instead the relationship between castes is bound by institutionalized rules, and highly ritualistic procedures come into play when people from different castes come into contact.

The feudal systems of Europe and Japan can in some ways be seen as caste systems in that the statuses of positions in the social stratifications systems were fixed, and there was little or no opportunity for movement through marriage or economic opportunities. In Europe, the estate system divided the population into clergy (first estate), nobility (second estate), and commoners (third estate), which included artisans, merchants, and peasants. In early European feudalism, it was still possible for a peasant or a warrior to achieve a high position in the clergy or nobility, but later the divisions



Figure 9.6. India used to have a rigid caste system. The people in the lowest caste suffered from extreme poverty and were shunned by society. Some aspects of India's defunct caste system remain socially relevant. The Indian woman in this photo is of a specific Hindu caste. (Photo courtesy of Elessar/Flickr)

became more rigid. In Japan, between 1603 and 1867, the *mibunsei* system divided society into five rigid strata in which social standing was inherited. At the top was the emperor, then court nobles (*kuge*), military commander-in-chief (*shogun*), and the land-owning lords (*daimyo*). Beneath them were four classes or castes: the military nobility (*samurai*), peasants, craftsmen, and merchants. The merchants were considered the lowest class because they did not produce anything with their own hands. There was also an outcast or untouchable caste known as the *burakumin,* who were considered impure or defiled because of their association with death: executioners, undertakers, slaughterhouse workers, tanners, and butchers (Kerbo, 2006).

However, the caste system is probably best typified by the system of stratification that existed in India from 4,000 years ago until the 20th century. In the Hindu caste tradition, people were also expected to work in the occupation of their caste and to enter into marriage according to their caste. Originally there were four castes: *Brahmans* (priests), *Kshatriyas* (military), *Vaisyas* (merchants), and *Sudras* (artisans, farmers). In addition there were the *Dalits* or *Harijans* ("untouchables"). Hindu scripture said, "In order to preserve the universe, Brahma (the Supreme) caused the Brahmin to proceed from his mouth, the Kshatriya to proceed from his arm, the Vaishya to proceed from his thigh, and the Shudra to proceed from his foot" (Kashmeri, 1990). Accepting this social standing was considered a moral duty. Cultural values and economic restrictions reinforced the system. Caste systems promote beliefs in fate, destiny, and the will of a higher power, rather than promoting individual freedom as a value. A person who lived in a caste society was socialized to accept his or her social standing.

Although the caste system in India has been officially dismantled, its residual presence in Indian society is deeply embedded. In rural areas, aspects of the tradition are more likely to remain, while urban centres show less evidence of this past. In India's larger cities, people now have more opportunities to choose their own career paths and marriage partners. As a global centre of employment, corporations have introduced merit-based hiring and employment to the nation.

The Class System

A **class system** is based on both social factors and individual achievement. It is at least a partially open system. A **class** consists of a set of people who have the same relationship to the **means of production** or productive property, that is, to the things used to produce the goods and services needed for survival: tools, technologies, resources, land, workplaces, etc. In Karl Marx's analysis, class systems form around the institution of private property, dividing those who own or control productive property from those who do not, who survive on the basis of their labour.

Social class has both a strictly *material* quality relating to these definitions of individuals' positions within a given

economic system, and a *social* quality relating to the formation of common class interests, political divisions in society, sites of conflict and compromise, life styles and consumption patterns, and what Max Weber called different "life chances" (1969). We will return to the differences between Marx's and Weber's definitions of class later in this chapter. Whether defined by material or social characteristics however, the main social outcome of the class structure is inequality in society.

Marx argued that class systems originated in early Neolithic horticultural societies when horticultural technologies increased yields to economic surpluses. The first class divisions developed between those who owned and controlled the agricultural land and surplus production and those who were dispossessed of ownership and control (i.e., the agricultural labourers). Prior to the Neolithic period 8,000 to 10,000 years ago, there were no classes. Societies were egalitarian and were characterized by equality of condition. For tens of thousands of years, hunter-gatherer societies shared productive property and resources collectively and did not produce economic surpluses. They could not form class societies.

In capitalism, the principle class division is between the capitalist class who live from the proceeds of owning or controlling productive property (capital assets like factories and machinery, or capital itself in the form of investments, stocks, and bonds) and the working class who live from selling their labour to the capitalists for a wage. Marx referred to these classes as the **bourgeoisie** and the **proletariat**, respectively. In addition, he described the classes of the **petite bourgeoisie** (the little bourgeosie) and the **lumpenproletariat** (the sub-proletariat). The petite bourgeoisie are those like shopkeepers, farmers, and contractors who own some property and perhaps employ a few workers but still rely on their own labour to survive. The lumpenproletariat are the chronically unemployed or irregularly employed who are in and out of the workforce. They are what Marx referred to as the "reserve army of labour," a pool of potential labourers who are surplus to the needs of production at any particular time.

In a class system, social inequality is structural, meaning that it is "built in" to the organization of the economy. The relationship to the means of production (i.e., ownership/non-ownership) defines a persistent, objective pattern of social relationships that exists, in a sense, prior to or outside of individuals' personal or voluntary choices and motives. In Marx's analysis, this was also the basis of class conflict, because objectively (i.e., beyond individuals' personal perceptions or beliefs) the class positions are contradictory. The existence of the bourgeoisie is defined by the economic drive to accumulate capital and increase profit. The key means to achieve this in a competitive marketplace is by reducing the cost of production by lowering the cost of labour (by reducing wages, moving production to lower wage areas, or replacing workers with labour-saving technologies). This contradicts the interests of the proletariat who seek to establish a sustainable standard of living by maintaining the level of their wages and the level of employment in society.

Making Connections: Social Policy and Debate

The Commoner Who Could Be Queen

On April 29, 2011, in London, England, Prince William, Duke of Cambridge, married Catherine ("Kate") Middleton, a commoner. It is rare, though not unheard of, for a member of the British royal family to marry a commoner. Kate Middleton had an upper-middle-class upbringing. Her father was a former flight dispatcher and her mother a former flight attendant. Kate and William met when they were both students at the University of St. Andrews in Scotland (Köhler, 2010).

Britain's monarchy arose during the Middle Ages. Its social hierarchy placed royalty at the top and commoners on the bottom. This was generally a closed system, with people born into positions of nobility. Wealth was passed from generation to generation through **primogeniture**, a law stating that all property would be inherited by the firstborn son. If the family had no son, the land went to the next closest male relation. Women could not inherit property and their social standing was primarily determined through marriage.

The arrival of the Industrial Revolution changed Britain's social structure. Commoners moved to cities, got jobs, and made better livings. Gradually, people found new opportunities to increase their wealth and power. Today, the government is a constitutional monarchy with the prime minister and other ministers elected to their positions, and with the royal family's role being largely ceremonial. The long-ago differences between nobility and commoners have blurred, and the modern class system in Britain is similar to that of the United States (McKee, 1996).



Figure 9.7. Prince William, Duke of Cambridge, who is in line to be King of England, married Catherine Middleton, a so-called commoner, meaning she does not have royal ancestry. (Photo courtesy of UK_repsome/Flickr)

Today, the royal family still commands wealth, power, and a great deal of attention. When Queen Elizabeth II retires or passes away, Prince Charles will be first in line to ascend the throne. If he abdicates (chooses not to become king) or dies, the position will go to Prince William. If that happens, Kate Middleton would be called Queen Catherine and hold the position of queen consort. She would be one of the few queens in history to have earned a university degree (Marquand, 2011).

There is a great deal of social pressure on her not only to behave as a royal but to bear children. The royal family recently changed its succession laws to allow daughters, not just sons, to ascend the throne. Her firstborn son, Prince George, was born on July 22, 2013, so the new succession law is not likely to be tested in the near future. Kate's experience — from commoner to possible queen — demonstrates the fluidity of social position in modern society.

While individual capitalists and individual workers might not see it this way, objectively the class interests clash and define a persistent pattern of management-labour conflict and political cleavage structures in modern, capitalist societies.

However, unlike caste systems, class systems are open. People are at least formally free to gain a different level of education or employment than their parents. They can move up and down within the stratification system. They can also socialize with and marry members of other classes, allowing people to move from one class to another. In other words, individuals can move up and down the class hierarchy, even while the class categories and the class hierarchy itself remain relatively stable.

This means that in a class system, one's occupation is not fixed at birth. Though family and other societal models help guide a person toward a career, personal choice plays a role. For example, Ted Rogers Jr. chose a career in media similar to that of his father but managed to move from a position of relative wealth and privilege in the petite bourgeoisie to being the fifth wealthiest bourgeois in the country. On the other hand, his father Ted Sr. chose a career in radio based on individual interests that differed from his own father's. Ted Sr.'s father, Albert Rogers, held a position as a director of Imperial Oil. Ted Sr. therefore moved from the class of the bourgeoisie to the class of the petite bourgeoisie.

9.2. Social Inequality and Mobility in Canada

Most sociologists define social class as a grouping based on similar social factors like wealth, income, education, and occupation. As we note later in the chapter, there is dispute within the discipline about the relative importance of different criteria for characterizing economic position. Whether the Marxist emphasis on property ownership is more important than the Weberian emphasis on gradations of occupational status is a matter for debate. Each definition captures some

aspects of the experience of inequality in modern society but misses others. Either way, the concept of class does imply a shared standard of living based on social factors like wealth, income, education, and occupation. These factors also affect how much power and prestige a person has. In most cases, having more money means having more power or more opportunities.

Standard of Living



Figure 9.8. (Image courtesy of Wayne Stadler/Flickr).

"When you've set up a place to sleep for the night, someone comes along and threatens you or forces you to leave, it's no way to live. It's tiring, to be forced to move every day or every night when you're cold and wet and have no place to go." (Testimony of Drug War Survivors member Harvey Clause, as quoted in Hollett, 2015)

In the last century, Canada has seen a steady rise in **standard of living**, the level of wealth available to acquire the material necessities and comforts to maintain one's lifestyle. The standard of living is based on factors such as income, employment, class, poverty rates, and affordability of housing. Because standard of living is closely related to quality of life, it can represent factors such as the ability to afford a home, own a car, and take vacations. Access to a standard of living that enables people to participate on an equal basis in community life is not equally distributed, however. The irony of rising standards of living is that one does not have to live in **absolute poverty —** "a severe deprivation of basic human needs, including food, safe drinking water, sanitation facilities, health, shelter, education and information" (United Nations, 1995) **—** to be marginalized and socially excluded. **Relative poverty** refers to the minimum amount of income or resources needed to be able to participate in the "ordinary living patterns, customs, and activities" of a society (Townsend, 1979).

In Canada, a small portion of the population has the means to the highest standard of living. Statistics Canada data from 2005 showed that 10 percent of the population held 58 percent of our nation's wealth (Osberg, 2008). In 2007, the richest 1 percent took 13.8 percent of the total income earned by Canadians (Yalnizyan, 2010). In 2010, the median income earner in the top 1 percent earned 10 times more than the median income earner of the other 99 percent (Statistics Canada, 2013). Wealthy people receive the most schooling, have better health, and consume the most goods and services. Wealthy people also wield decision-making power. One aspect of their decision-making power comes from their positions as owners or top executives of corporations and banks. They are able to grant themselves salary raises and bonuses. By 2010, only two years into the economic crisis of 2008, the executive pay of CEOs at Canada's top 100 corporations jumped by 13 percent (McFarland, 2011), while negotiated wage increases in 2010 amounted to only 1.8 percent (HRSDC, 2010).

Many people think of Canada as a middle-class society. They think a few people are rich, a few are poor, and most are pretty well off, existing in the middle of the social strata. But as the data above indicate, the distribution of wealth is not even. Millions of women and men struggle to pay rent, buy food, and find work that pays a living wage. Moreover, the share of the total income claimed by those in the middle-income ranges has been shrinking since the early 1980s, while the share taken by the wealthiest has been growing (Osberg, 2008).

Making Connections: Sociological Research

Measuring Levels of Poverty

Statistics Canada produces two relative measures of poverty: the low income measure (LIM) and the low income cut-off (LICO) measure. Human Resources and Skills Development Canada has developed an absolute measure: the market basket measure (MBM).

Low income measure: The LIM is defined as half the median family income. A person whose income is below that level is said to be in low income. The LIM is adjusted for family size.

Low income cut-off: The LICO is the income level below which a family would devote at least 20 percentage points more of their income to food, clothing, and shelter than an average family would. People are said to be in the low-income group if their income falls below this threshold. The threshold varies by family size and community size, as well as if income is calculated before or after taxes. For example, a single individual in Toronto would be said to be living in low income if his or her 2009 after-tax income was below $18,421.

Market basket measure: The MBM is a measure of the disposable income a family would need to be able to purchase a basket of goods that includes food, clothing, shelter, transportation, and other basic needs. The dollar value of the MBM varies by family size and composition, as well as community size and location. MBM data are available since 2000 only.

The three measures produce different results. In 2009, according to each measure, the following numbers of Canadians were living in low income:

- LICO—3.2 million (9.6 per cent of the population)
- MBM—3.5 million (10.6 per cent)
- LIM—4.4 million (13.3 per cent)

Table 9.1 shows how the three measures also produce different results over time. Using the LICO measure results in a decreasing share of people in low income from 1996 to 2007, followed by a slight upturn in 2008 and 2009. The LIM measure results in a share of people in low income that has increased since 1990. The MBM, which has data starting only in 2000, shows results similar to the LICO but with a sharper upturn in 2008 and 2009.

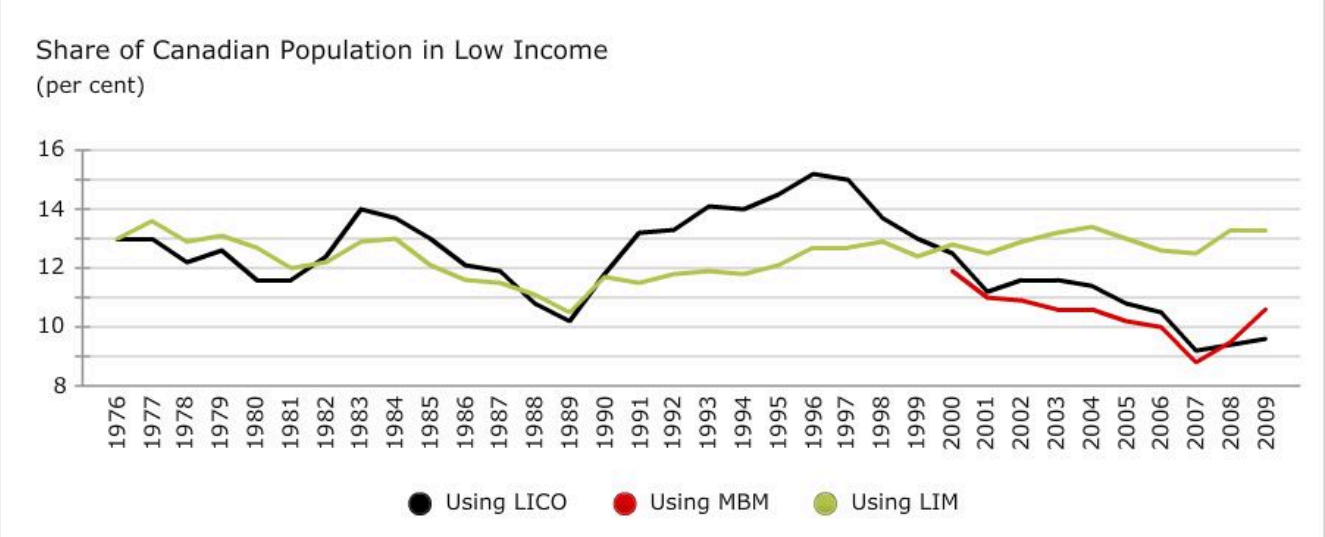


Table 9.1. "Measuring Levels of Poverty" excerpted from The Conference Board of Canada "Canadian Income Inequality: Is Canada becoming more unequal?" (2011, http://www.conferenceboard.ca/hcp/hot-topics/caninequality.aspx). (Used under the Conference Board of Canada's Terms of Use: http://www.conferenceboard.ca/terms_of_use.aspx)

Trends in Social Inequality

The news from sociological research into inequality is that the gap in income and wealth between the rich and the poor has been increasing in Canada (Osberg, 2008). In 1982, the median income earner in the top 1% of incomes earned seven times more than the median income earner in the other 99%. In 2010, the median income earner in the top 1% earned ten times more. Moreover, while the median income for the top 1% increased from $191,600 to $283,000 in constant dollars (i.e., adjusted for inflation), the median income for the bottom 99% only increased from $28,000 to $28,400. In the early 1980s, the top 1% of income earners accounted for 7% of the total income generated in Canada, whereas in 2010 they accounted for 10.6%, down slightly from 12.1% in 2006 (Statistics Canada, 2013). In effect, the incomes for middle-income earners remained flat over the last 30 years, while the incomes for the top 1% increased significantly both in absolute terms and as a proportion of all incomes. (Note: Median income is not the same as average income. It refers to the amount that the person who is exactly in the middle of an income range earned: 50% of the people in this income range earned more than the median, and 50% earned less).

Table 9.2. Share of Aggregate Incomes Received by Each Quintile of Families and Unattached Individuals. (Table courtesy of Osberg, 2008/CCPA)

[Skip Table]

Income Group	1951	1961	1971	1981	1991	1996	2001	2005
Bottom 20% (poorest)	4.4%	4.2%	3.6%	4.6%	4.5%	4.2%	4.1%	4.1%
Second 20%	11.2%	11.9%	10.6%	11%	10%	9.6%	9.7%	9.6%
Middle 20%	18.3%	18.3%	17.6%	17.7%	16.4%	16%	15.6%	15.6%
Fourth 20%	23.3%	24.5%	24.9%	25.1%	24.7%	24.6%	23.7%	23.9%
Top 20% (richest)	42.8%	41.1%	43.3%	41.6%	44.4%	45.6%	46.9%	46.9%

Sources Statistics Canada (1998) Income Distribution by Size in Canada Catalogue No. 13-207, CANSIM Table 202-0701, V1546465, J.R. Podoluk (1968) *Incomes of Canadians*, Dominion Bureau of Statistics.

This discrepancy does not simply mean that the very rich are increasing their share of the wealth at the expense of the very poor — the middle classes are also losing their share of the wealth. One way to analyze this trend is to examine the changing distribution of income in Canada over time. In Table 9.2 (above), changes in inequality are measured by looking at how the total annual income is distributed between each fifth (or "quintile") of Canadian families from the lowest earning to highest earning for different years (Osberg, 2008). If perfect *equality of income* existed, each quintile would have earned exactly 20% of the total income. Instead, Table 9.2 shows that between 1951 and 1981 the top 20% of family units received around 42% of total income, but after 1981 this figure steadily increased to 47%. On the other hand, the share of income of the middle 60% of families declined by 4.7%, going from 53.8% to 49.1%. The lowest 20% also lost 0.5% of their already tiny share, going from 4.6% to 4.1%. Although the majority of people in Canada have not seen any growth in real income in three decades (Osberg, 2008), the average income of the top 1% grew by about 180% (Yalnizyan, 2010). Over this period, the share of the total income received by the top 1% has doubled, the top 0.1% has tripled, and the top 0.01% has quintupled (Yalnizyan, 2010).

Why is this news? For several decades, Lars Osberg notes that the joke was that the study of income inequality was like watching grass grow because nothing ever happened (2008). Between 1946 and 1981, changes in income inequality were small despite the fact the Canadian economy went through a massive transformation: It transformed from an agricultural base to an industrial base; the population urbanized and doubled in size; the overall production of wealth measured by gross domestic product (GDP) increased by 4.5%; and per capita output increased by 227% (Osberg, 2008). As Osberg puts it, the key question was why did economic inequality not change during this period of massive transformation? From 1981 until the present, during another period of rapid and extensive economic change in which the overall production of wealth continued to expand, economic inequality has increased dramatically. What happened?

The main explanatory factor is that between 1946 and 1981 real wages increased in pace with the growth of the economy, but since 1981 only the top 20% of families have seen any meaningful increase in real income while the very wealthy have seen huge increases. The taxable income of the top 1% of families increased by 80% between 1982 and 2004

(Obsberg, 2008). Neoliberal policies of reduced state expenditures and tax cuts have been major factors in defining the difference between these two eras. The neoliberal theory that the benefits of tax cuts to the rich would "trickle down" to the middle class and the poor has proven false. The biggest losers with regard to neoliberal policy, of course, are the very poor. As Osberg notes, it was not until the 1980s and 1990s that the homeless — those forced to beg in the streets and those dependent on food banks — began to appear in Canada in significant numbers (2008).

Some have argued that to the degree that *equality of opportunity* exists, *inequality of condition* or inequality of "outcome" is perhaps not fair, but it is justifiable. Others have argued that because capitalism is built on the basis of structural inequality, equality of condition is impossible. The idea that equality of opportunity — a **meritocracy** — actually exists and that it leads to a meaningful access to social mobility — the movement of people from one social position to another — is debatable, as we will see below. Also, it is important to note that if total equality of condition — a world where everyone's social position and financial rewards would be exactly the same — is unlikely, varying degrees of social inequality are possible. In fact degrees of social inequality vary significantly between jurisdictions.

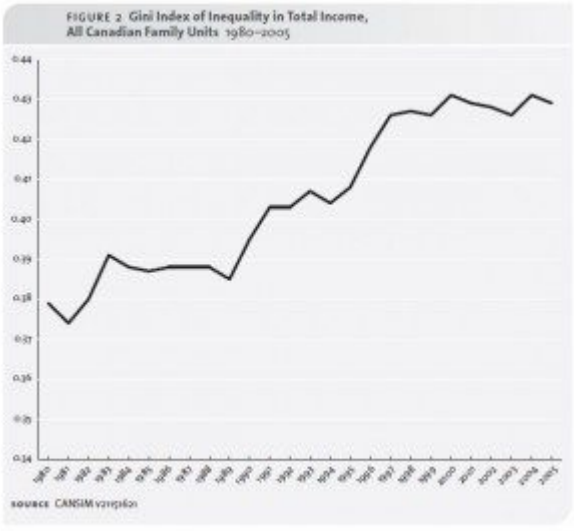


Table 9.3. Gini Index of inequality: 1980-2005 (Figure courtesy of Osberg, 2008/CCPA)

The **Gini Index** is a measure of income inequality in which zero is absolute equality and one is absolute inequality. Table 9.3 shows that Canada's degree of inequality increased by 5% between 1980 and 2005 from a Gini Index of 0.38 to 0.43 (Osberg, 2008). From a comparative perspective, Canada's Gini Index is much higher than many European countries but is lower than the extremes of inequality in the United States and Mexico (who are Canada's NAFTA partners). See Table 9.4 (below). This comparison indicates that a much greater equality of condition can exist even under the same pressures of globalization if different social and economic policy models are chosen. Even though the countries with the lowest levels of inequality — Denmark, Sweden, the Netherlands, and Austria — have progressive tax systems and strong welfare states, they are able to maintain high levels of employment and economic growth while remaining "competitive" in the global economy (Osberg, 2010). If addressing poverty and inequality rather than promoting greater transfers of wealth to the rich is a reasonable goal, a variety of viable policy alternatives are available from which Canadians can choose.

Social Classes in Canada

Does a person's appearance indicate class? Can you tell a person's education level based on clothing? Do you know a person's income by the car one drives? There was a time in Canada when people's class was more visibly apparent. In some countries, like the United Kingdom, class differences can still be gauged by differences in schooling, lifestyle, and even accent. In Canada, however, it is harder to determine class from outward appearances.

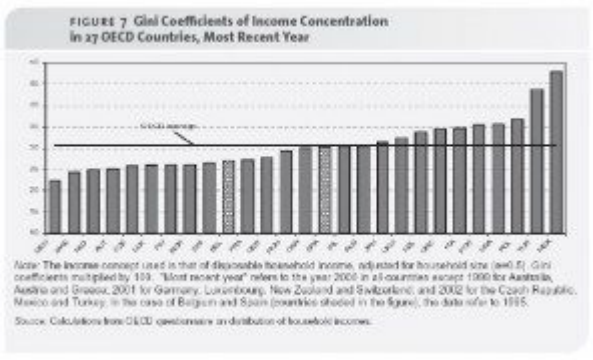


Table 9.4. Gini Coefficients of Income Concentration in 27 OECD Countries, 2000 (or Most Recent Year) (Figure courtesy of Osberg, 2008/CCPA)

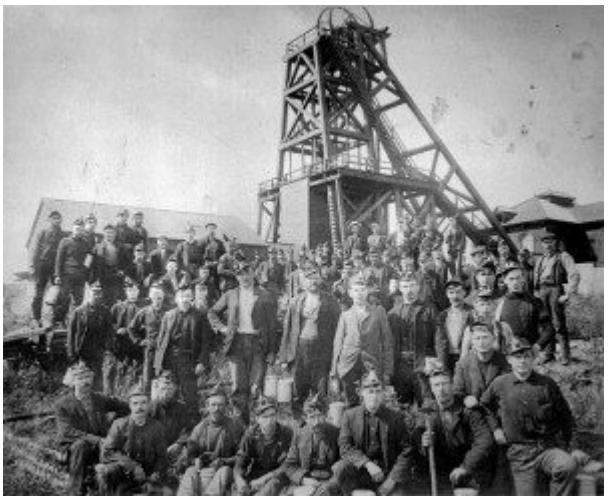


Figure 9.9: The traditional working class — Miners in Nanaimo, B.C. (late 19th century). The Nanaimo coal mines were the site of a brutal two-year strike from 1912–1914 against low wages and dangerous working conditions. Source: Miners of Number One Mine, Nanaimo, at the pithead, B-03624 (Image courtesy of the Royal B.C. Museum)



Figure 9.10: The owning class—James and Laura Dunsmuir shown beside their Italian-style garden at their Hatley Castle residence near Victoria, B.C. (now part of Royal Roads University). James Dunsmuir was heir to his family's coal fortune and managed the family coal operations on Vancouver Island from 1876–1910. He was a powerful spokesman for capitalist interests and anti-union efforts in B.C. and spent two years as B.C. Premier from 1900–1902. (Image courtesy of …)

For sociologists, too, categorizing class is a fluid science. The chief division in the discipline is between Marxist and Weberian approaches to social class (Abercrombie & Urry, 1983). Marx's analysis, as we saw earlier in this chapter, emphasized a materialist approach to the underlying structures of the capitalist economy. Marx's definition of social class rested essentially on one variable: a group's relation to the means of production (ownership or non-ownership of productive property or capital). In Marxist class analysis there are, therefore, two dominant classes in capitalism — the working class and the owning class — and any divisions within the classes based on occupation, status, education, etc. are less important than the tendency toward the increasing separation and polarization of these classes.

Weber defined social class slightly differently, as the "life chances" or opportunities to acquire rewards one shares in common with others by virtue of one's possession of property, goods, or opportunities for income (1969). Owning property/capital or not owning property/capital is still the basic variable that defines a person's class situation or life chances. However, class is defined with respect to *markets* rather than the process of *production*. It is the value of one's products or skills on the labour market that determines whether one has greater or lesser life chances. This leads to a hierarchical class schema with many gradations. A surgeon who works in a hospital is a member of the working class in Marx's model, just like cable TV technicians, for example, because he or she works for a wage or salary. Nevertheless the skill the surgeon sells is valued much more highly in the labour market than that of cable TV technicians because of the relative rarity of the skill, the number of years of education required to learn the skill, and the responsibilities involved in practising the skill.

Analyses of class inspired by Weber tend to emphasize gradations of status with regard to a number of variables like wealth, income, education, and occupation. Class stratification is not just determined by a group's economic position but by the prestige of the group's occupation, education level, consumption, and lifestyle. It is a matter of **status** — the level of honour or prestige one holds in the community by virtue of ones social position — as much as a matter of class. Based on the Weberian approach, some sociologists talk about upper, middle, and lower classes (with many subcategories within them) in a way that mixes status categories with class categories. These gradations are often referred to as a group's **socio-economic status** (**SES**), their social position relative to others based on income, education, and occupation. For example, although plumbers might earn more than high school teachers and have greater life chances in a particular economy, the status division between blue-collar work (people who "work with their hands") and white-collar work (people who "work with their minds") means that plumbers, for example, are characterized as lower class but teachers as middle class. There is an arbitrariness to the division of classes into upper, middle, and lower.

However, this manner of classification based on status distinctions does capture something about the subjective experience of class and the shared lifestyle and consumption patterns of class that Marx's categories often do not. An NHL hockey player receiving a salary of $6 million a year is a member of the working class, strictly speaking. He might even go on strike or get locked out according to the dynamic of capital/labour conflict described by Marx. Nevertheless it is difficult to see what the life chances of the hockey player have in common with a landscaper or truck driver, despite the fact they might share a common working-class background.

Social class is, therefore, a complex category to analyze. Social class has both a strictly *material* quality relating to a group's structural position within the economic system, and a *social* quality relating to the formation of status gradations, common subjective perceptions of class, political divisions in society, and class-based lifestyles and consumption patterns. Taking into account both the Marxist and Weberian models, social class has at least three objective components: a group's position in the occupational structure, a group's position in the authority structure (i.e., who has authority over whom), and a group's position in the property structure (i.e., ownership or non-ownership of capital). It also has an important subjective component that relates to recognitions of status, distinctions of lifestyle, and ultimately how people perceive their place in the class hierarchy.

One way of distinguishing the classes that takes this complexity into account is by focusing on the authority structure. Classes can be divided according to how much relative power and control members of a class have over their lives. On this basis, we might distinguish between the owning class (or bourgeoisie), the middle class, and the traditional working class. The owning class not only have power and control over their own lives, their economic position gives them power and control over others' lives as well. To the degree that we can talk about a "middle class" composed of small business owners and educated, professional, or administrative labour, it is because they do not generally control other strata of society, but they do exert control over their own work to some degree. In contrast, the traditional working class has little control over their work or lives. Below, we will explore the major divisions of Canadian social class and their key subcategories.

Making Connections: Classic Sociologists

Marx and Weber on Social Class: How Do They Differ?



Figure 9.11. Max Weber: Class as common "life chances" based on possession of goods and opportunities for income (Image courtesy of Wikimedia Commons)

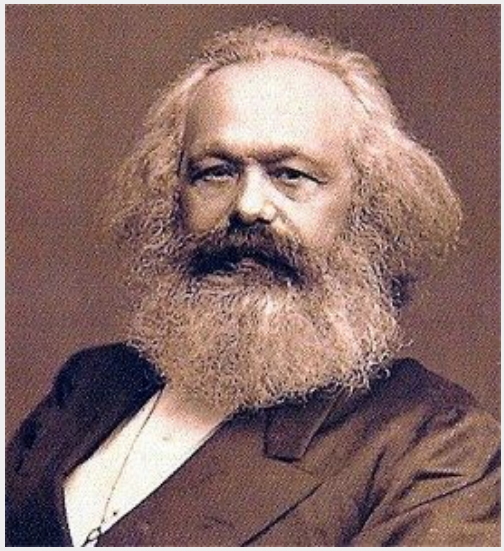


Figure 9.12. Karl Marx: Class as relationship to the means of production (Image courtesy of Wikimedia Commons).

Often, Marx and Weber are perceived to be at odds in their approaches to class and social inequality, but it is perhaps better to see them as articulating different styles of analysis. Weber's analysis presents a more complex model of the social hierarchy of capitalist society than Marx. Weber's model goes beyond *structural* class position to include the variables of **status** (degree of social prestige or honour) and **power** (degree of political influence). Thus, Weber provides a multi-dimensional model of social hierarchy. It is important to note that although individuals might be from the same objective class, their position in the social hierarchy might differ according to their status and political influence. For example, women and men might be equal in terms of their class position, but because of the inequality in the status of the genders within each class, women as a group remain lower in the social hierarchy.

With respect to class, Weber also relies on a different definition than Marx. Weber defines class as the "life chances" one shares in common with others by virtue of one's possession of goods or opportunities for income (1969). Class is defined with respect to markets rather than the process of production. As in Marx's analysis, the economic interests that stem from owning property/capital or not owning property/capital are still the basic variables that define one's class situation or life chances. However, as the value of different types of property (e.g., industrial, real estate, financial, etc.) or different types of opportunity for income (i.e., different types of marketable skills) varies according to changes in the commodity or labour markets, Weber can provide a more nuanced description of an individual's class position than Marx. A skilled tradesman like a pipe welder might enjoy a higher class position and greater life chances in Northern Alberta where such skills are in demand, than a high school teacher in Vancouver or Victoria where the number of qualified teachers exceeds the number of positions available. If we add the element of status into the picture, the situation becomes even more complex as the educational requirements and social responsibilities of the high school teacher usually confer more social prestige than the requirements and responsibilities of the pipe welder. Nevertheless,

Weber's analysis is *descriptive* rather than *analytical*. It can provide a useful description of differences between the levels or "strata" in a social hierarchy or stratification system, but does not provide an analysis of the formation of hierarchy itself.

On the other hand, Marx's analysis of class is essentially one-dimensional. It has one variable: the relationship to the means of production. If one is a professional hockey player or a clerk in a supermarket, one works for a wage and is therefore a member of the working class. In this regard, his analysis challenges common sense as the difference between the different "fragments" of the working class — those who survive by selling their labour for a wage or salary — seem paramount, at least from the point of view of the subjective experience of class. It would seem that hockey players, doctors, lawyers, professors, and business executives have very little in common with grocery clerks, factory or agricultural workers, tradespersons, or low level administrative staff despite the fact that they all depend on being paid by someone. However, the key point of Marx's analysis is not to ignore the existence of status distinctions within classes, but to examine class structure *dialectically* so to provide a more comprehensive and historical picture of class dynamics.

You will recall the four components of dialectical analysis from Chapter 1: Everything is related; everything changes; change proceeds from the quantitative to the qualitative; and change is the product of the unity and struggle of opposites. These dialectical qualities are also central to Marx's account of the hierarchical structure of classes in capitalist society. The main point of the dialectical analysis of class is that the working class and the owning class have to be understood in relationship to one another. They emerged together out of the old class structure of feudalism, and each exists only because the other exists. The wages that define the wage labourer are paid by the capitalist; the profit and capital accumulated by the capitalist are products of the workers' labour.

In Marx's dialectical model, change occurs because the "unity" of this system is characterized by the struggle of opposites (i.e., the classes are "structurally in conflict" because of the contradiction in their class interests). The composition of classes changes over time; the statuses of different occupations vary; the proportions between workers' income and capitalists' profit change; and the types of production and the means of production change (through the introduction of labour saving technologies, globalization, new commodities, etc.). In addition, change proceeds from the quantitative to the qualitative in the sense that changes in purely quantitative variables like salary, working conditions, unemployment levels, rates of profitability, etc. lead to changes in qualitative variables like the subjective experience of class, the divisions of "left" and "right" in political struggles, and the formation of class consciousness.

Thus, the strength of Marx's analysis is its ability to go beyond a description of where different groups fit within the class structure at a given moment in time to an analysis of why those groups and their relative positions change with respect to one another. The dialectical approach reveals the underlying logic of class structure as a dynamic system and the potential commonality of interests and subjective experiences that define class-consciousness. As a result, in an era in which the precariousness of many high status jobs has become clearer, the divisions of economic interests between the different segments of the working class becomes less so.

The Owning Class

The owning class is considered Canada's top, and only the powerful elite get to see the view from there. In Canada, the richest 86 people (or families) account for 0.002 percent of the population, but in 2012 they had accumulated the equivalent wealth of the lowest 34 percent of the country's population (McDonald, 2014). The combined net worth of these 86 families added up to $178 billion in 2012, which equalled the net worth of the lowest 11.4 million Canadians. In terms of income, in 2007 the average income of the richest 0.01 percent of Canadians was $3.833 million (Yalnizyan, 2010).

Money provides not just access to material goods, but also access to power. Canada's owning class wields a lot of power. As corporate leaders, their decisions affect the job status of millions of people. As media owners, they shape the collective identity of the nation. They run the major network television stations, radio broadcasts, newspapers, magazines, publishing houses, and sports franchises. As philanthropists, they establish foundations to support social causes they believe in. They also fund think tanks like the C. D. Howe Institute and the Fraser Institute that promote the values and interests of business elites. As campaign contributors, they influence politicians and fund campaigns, usually to protect their own economic interests.



Figure 9.13. Members of the upper class can afford to live, work, and play in exclusive places designed for luxury and comfort. (Photo courtesy of PrimeImageMedia.com/ Flickr)

Canadian society has historically distinguished between "old money" (inherited wealth passed from one generation to the next) and "new money" (wealth you have earned and built yourself). While both types may have equal net worth, they have traditionally held different social standing. People of old money, firmly situated in the upper class for generations, have held high prestige. Their families have socialized them to know the customs, norms, and expectations that come with wealth. Often, the very wealthy do not work for wages. Some study business or become lawyers in order to manage the family fortune.

New money members of the owning class are not oriented to the customs and mores of the elite. They have not gone to the most exclusive schools. They have not established old-money social ties. People with new money might flaunt their wealth, buying sports cars and mansions, but they might still exhibit behaviours attributed to the middle and lower classes. For example, Toronto politicians Rob and Doug Ford are estimated to hold family assets worth $50 million, yet they present themselves as just "average guys" who stand with their blue-collar constituents against "rich elitist people" (McArther, 2013; Warner, 2014). Rob Ford's infamous crack cocaine smoking, public binge drinking, and use of foul language would not make him at home within the circles of old money in Canada.

The Middle Class

Many people call themselves middle class, but there are differing ideas about what that means. People with annual incomes of $150,000 call themselves middle class, as do people who annually earn $30,000. That helps explain why some sociologists divide the middle class into upper and lower subcategories. These divisions are based on gradations of status defined by levels of education, types of work, cultural capital, and the lifestyles afforded by income.

Upper-middle-class people tend to hold bachelor's and postgraduate degrees in subjects such as business, management, law, or medicine that lead to occupations in the professions. **Professions** are occupations that claim high levels of specialized technical and intellectual expertise and are governed and regulated by autonomous professional organizations (like the Canadian Medical Association or legal bar associations). Lower-middle-class members hold bachelor's degrees or associate's degrees from two-year community or technical colleges that lead to various types of white collar, service, administrative, or paraprofessional occupations.

Comfort is a key concept to the middle class. Middle-class people work hard and live fairly comfortable lives. Upper-middle-class people tend to pursue careers that earn comfortable incomes. They provide their families with large homes and nice cars. They may go skiing or boating on vacation. Their children receive quality educations (Gilbert, 2010).

In the lower middle class, people hold jobs supervised by members of the upper middle class. They fill technical, lower-level management or administrative support positions. Compared to traditional working-class work, lower-middle-class



Figure 9.14. These members of a club likely consider themselves middle class. (Photo courtesy of United Way Canada-Centraide Canada/Flickr)

jobs carry more prestige and come with slightly higher paycheques. With these incomes, people can afford a decent, mainstream lifestyle, but they struggle to maintain it. They generally do not have enough income to build significant savings. In addition, their grip on class status is more precarious than in the upper tiers of the class system. When budgets are tight, lower-middle-class people are often the ones to lose their jobs.

The Traditional Working Class



Figure 9.15. This man is a custodian at a restaurant. His job, which is crucial to the business, is considered lower class. (Photo courtesy of Frederick Md Publicity/Flickr)

The traditional working class is sometimes also referred to as being part of the lower class. Just like the middle and upper classes, the lower class can be divided into subsets: the working class, the working poor, and the underclass. Compared to the middle class, traditional working-class people have less of an educational background and usually earn smaller incomes. While there are many working-class trades that require skill and pay middle-class wages, the majority often work jobs that require little prior skill or experience, doing routine tasks under close supervision.

Traditional working-class people, the highest subcategory of the lower class, are usually equated with blue-collar types of jobs: "wage-workers who are engaged in the production of commodities, the extraction of natural resources, the production of food, the operation of the transportation network required for production and distribution, the construction industry, and the maintenance of energy and communication networks" (Veltmeyer, 1986, p. 83). The work is considered blue collar because it is hands-on and often physically demanding. The term "blue collar" comes from the traditional blue coveralls worn by manual labourers.

Beneath those in the working class are the working poor. Like some sections of the working class, they have unskilled, low-paying employment. However, their jobs rarely offer benefits such as retirement planning, and their positions are often seasonal or temporary. They work as migrant farm workers, house cleaners, and day labourers. Some are high school dropouts. Some are illiterate, unable to read job ads. Many do not vote because they do not believe that any politician will help change their situation (Beeghley, 2008).

How can people work full time and still be poor? Even working full time, more than a million of the working poor earn incomes too meagre to support a family. In 2012, 1.8 million working people (including 540,000 working full time year round) earned less than Statistic Canada's low income cut-off level, which defines poverty in Canada (Johnstone & Cooper, 2013). Minimum wage varies from province to province, from $9.95/h in Alberta to $11/h in Nunavut and Ontario (Retail Council of Canada, 2014). However, it is estimated that a **living wage —** based on a 35-hour work week **—** is $19.14/h in Vancouver, $16.60/h in Toronto, and $14.95/h in Hamilton (differences due to the difference in cost of living in these locations). A living wage is the amount needed to meet a family's basic needs and enable them to participate in community life (Johnstone & Cooper, 2013). Even for a single person, minimum wage is low. A married couple with children will have a hard time covering expenses.

The underclass or lumpenproletariat is Canada's lowest tier. Members of the underclass live mainly in inner cities. Many are unemployed or underemployed. Those who do hold jobs typically perform menial tasks for little pay. Some of the underclass are homeless. For many, welfare systems provide a much-needed support through food assistance, medical care, housing, and the like.

Social Mobility

Social mobility refers to the ability to change positions within a social stratification system. When people improve or diminish their economic status in a way that affects social class, they experience social mobility. This is a key concept in determining whether inequalities of condition limit people's life chances or whether we can meaningfully speak of the existence of equality of opportunity in a society. A high degree of social mobility, upwards or downwards, would suggest that the stratification system of a society is in fact open (i.e., that there is equality of opportunity).

Upward mobility refers to an increase **—** or upward shift **—** in social class. In Canada, people applaud the rags-to-riches achievements of celebrities like Guy Laliberté who went from street busking in Quebec to being the CEO of Cirque du Soleil, with a net worth of $2.5 billion. Actor and comedian Jim Carey lived with his family in camper van at one point growing up in Scarborough, Ontario. Ron Joyce was a beat policemen in Hamilton before he co-founded Tim Hortons. CEO of Magna International Frank Stronach immigrated to Canada from Austria in 1955 with only $50 to his name. There are many stories of people from modest beginnings rising to fame and fortune. But the truth is that relative to the overall population, the number of people who launch from poverty to wealth is very small. Still, upward mobility is not only about becoming rich and famous. In Canada, people who earn a university degree, get a job promotion, or marry someone with a good income may move up socially.

Downward mobility indicates a lowering of one's social class. Some people move downward because of business setbacks, unemployment, or illness. Dropping out of school, losing a job, or becoming divorced may result in a loss of income or status and, therefore, downward social mobility.

Intergenerational mobility explains a difference in social class between different generations of a family. For example, an upper-class executive may have parents who belonged to the middle class. In turn, those parents may have been raised in the lower class. Patterns of intergenerational mobility can reflect long-term societal changes.

Intragenerational mobility describes a difference in social class between different members of the same generation. For example, the wealth and prestige experienced by one person may be quite different from that of his or her siblings.

Structural mobility happens when societal changes enable a whole group of people to move up or down the social

class ladder. Structural mobility is attributable to changes in society as a whole, not individual changes. In the first half of the 20th century industrialization expanded the Canadian economy, which raised the standard of living and led to upward structural mobility. In today's work economy, the recession and the outsourcing of jobs overseas have contributed to high unemployment rates. Many people have experienced economic setbacks, creating a wave of downward structural mobility.

Many Canadians believe that people move up in class because of individual efforts and move down by their own doing. In the ideal of equality of opportunity, one's access to rewards would exactly equal one's personal efforts and merits toward achieving those rewards. One's class position or other social characteristics (gender, race, ethnicity, etc.) would not skew the relationship between merit and rewards. Others believe that equality of opportunity is a myth designed to keep people motivated to work hard, while getting them to accept social inequality as the legitimate outcome of personal achievement. The ideology of equality of opportunity is just a mirage that masks real and permanent structural inequality in society. The rich stay rich, and the poor stay poor. Data that measures social mobility suggest that the truth is a bit of both.

Typically social mobility is measured by comparing either the occupational status or the earnings between parents and children. If children's earnings or status remain the same as their parents then there is no social mobility. If children's earnings or status moves up or down with respect to their parents, then there is social mobility. Corak and colleagues compared "intergenerational earnings elasticity" between fathers and sons in Canada and the United States (2010). (Some data are available on daughters as well, but it is less common and therefore difficult to use to make cross-national comparisons.) Intergenerational earnings elasticity gives a percentage figure that indicates the degree to which fathers' income predicts sons' income (i.e., the degree of intergenerational "stickiness" or lack of social mobility). The data show that there is a much lower degree of social mobility in the United States than in Canada. While earnings elasticity (from 2006 data) in the United States was 0.47, meaning that almost one half of the fathers' earning advantage was passed on to their sons, in Canada the figure was 0.19, meaning that less than one-fifth of the father's earnings advantage was passed on. This suggests that Canada has a relatively high rate of social mobility and equality of opportunity compared to the United States, where almost 50 percent of sons remain at the same income level as their fathers. In an international comparison, the United Kingdom had even lower social mobility than the United States with an earnings elasticity of 0.50, while Finland, Norway, and Denmark had greater social mobility than Canada with earnings elasticities of 0.18, 0.17, and 0.15 respectively.

One of the key factors that distinguishes Canada's degree of social mobility from that of the United States is that the United States has a much greater degree of social inequality to begin with. The higher degree of social inequality is linked to lower degrees of social mobility. The main factor that contributes to the difference in the intergenerational earnings elasticity figures is that there is a great degree of intergenerational social *immobility* at the lower and higher ranges of the income scale in the United States. For example, over 25 percent of sons born to fathers in the top 10 percent of income earners remain in the top 10 percent, compared to about 18 percent in Canada. On the other hand, in the United States, 22 percent of sons born to fathers in the bottom 10 percent of income earners remain in the bottom 10 percent, while another 18 percent only move up to the bottom 10 to 20 percent of income earners. The figures for Canada are 16 percent and 14 percent respectively (Corak et al., 2010).

However, these data also show that Canada by no means has "perfect" social mobility or equality of opportunity. Class background significantly affects one's chances to get ahead. For example, the chance that a son born to a father in the 30 to 40 percent or 40 to 50 percent ranges of income earners (i.e., in 2004 families averaging $42,000 or $55,000 a year respectively) would move up into the top 50 percent of income earners (i.e., families averaging $65,000 a year or more) was about 50 percent (Yalnizyan, 2007). In contrast, a son from the bottom 20 percent of income earners had only a 38 percent chance of moving into the top 50 percent of income earners. For the bottom 20 percent of families, 62 percent of sons remained within the bottom 50 percent of income earners (Corak et al., 2010).

Class Traits

Class traits, also called class markers, are the typical behaviours, customs, and norms that define each class. They define a crucial subjective component of class identities. Class traits indicate the level of exposure a person has to a wide range of cultural resources. Class traits also indicate the amount of resources a person has to spend on items like hobbies, vacations, and leisure activities.

People may associate the upper class with enjoyment of costly, refined, or highly cultivated tastes — expensive clothing,



Figure 9.16. Does taste or fashion sense indicate class? Is there any way to tell if this young man comes from an upper-, middle-, or lower-class background? (Photo courtesy of Kelly Bailey/Flickr)

luxury cars, high-end fundraisers, and opulent vacations. People may also believe that the middle and lower classes are more likely to enjoy camping, fishing, or hunting, shopping at large retailers, and participating in community activities. It is important to note that while these descriptions may be class traits, they may also simply be stereotypes. Moreover, just as class distinctions have blurred in recent decades, so too have class traits. A very wealthy person may enjoy bowling as much as opera. A factory worker could be a skilled French cook. Pop star Justin Bieber might dress in hoodies, ball caps, and ill fitting clothes, and a low-income hipster might own designer shoes.

These days, individual taste does not necessarily follow class lines. Still, you are not likely to see someone driving a Mercedes living in an inner-city neighbourhood. And most likely, a resident of a wealthy gated community will not be riding a bicycle to work. Class traits often develop based on cultural behaviours that stem from the resources available within each class.

Making Connections: Sociological Research

Turn-of-the-Century "Social Problem Novels": Sociological Gold Mines

Class distinctions were sharper in the 19th century and earlier, in part because people easily accepted them. The ideology of social order made class structure seem natural, right, and just.

In the late 19th and early 20th centuries, American and British novelists played a role in changing public perception. They published novels in which characters struggled to survive against a merciless class system. These dissenting authors used gender and morality to question the class system and expose its inequalities. They protested the suffering of urbanization and industrialization, drawing attention to these issues.

These "social problem novels," sometimes called Victorian realism, forced middle-class readers into an uncomfortable position: The readers had to question and challenge the natural order of social class.

For speaking out so strongly about the social issues of class, authors were both praised and criticized. Most authors did not want to dissolve the class system. They wanted to bring about an awareness that would improve conditions for the lower classes, while maintaining their own higher-class positions (DeVine, 2005).



Figure 9.17. Charles Dickens (Photo courtesy of Wikimedia Commons).

Soon, middle-class readers were not their only audience. In 1870, Forster's Elementary Education Act required all children aged five through 12 in England and Wales to attend school. The act increased literacy levels among the urban poor, causing a rise in sales of cheap newspapers and magazines. Additionally, the increasing number of people who rode public transit systems created a demand for "railway literature," as it was called (Williams, 1984). These reading materials are credited with the move toward democratization in England. By 1900 the British middle class established a rigid definition for itself, and England's working class also began to self-identify and demand a better way of life.

Many of the novels of that era are seen as sociological goldmines. They are studied as existing sources because they detail the customs and mores of the upper, middle, and lower classes of that period in history.

Examples of "social problem" novels include Charles Dickens's (1812–1870) *The Adventures of Oliver Twist* (1838), which shocked readers with its brutal portrayal of the realities of poverty, vice, and crime. Thomas Hardy's (1840–1928) *Tess of the d'Urbervilles* (1891) was considered revolutionary by critics for its depiction of working-class women (DeVine, 2005), and American novelist Theodore Dreiser's (1871–1945) *Sister Carrie* (1900) portrayed an accurate and detailed description of early Chicago.

9.3. Global Stratification and Inequality

Global stratification compares the wealth, economic stability, status, and power of countries across the world. Global stratification highlights worldwide patterns of social inequality.

In the early years of civilization, hunter-gatherer and agrarian societies lived off the Earth, rarely interacting with other societies. When explorers began travelling, societies began trading goods as well as ideas and customs.



Figure 9.18. (a) A family lives in this grass hut in Ethiopia. (b) Another family lives in a single-wide trailer in the trailer park in the United States. Both families are considered poor or lower class. With such differences in global stratification, what constitutes poverty? (Photo (a) courtesy of Canned Muffins/Flickr; photo (b) courtesy of Herb Neufeld/Flickr)

In the 19th century, the Industrial Revolution created unprecedented wealth in Western Europe and North America. Due to mechanical inventions and new means of production, people began working in factories — not only men, but women and children as well. By the late 19th and early 20th centuries, industrial technology had gradually raised the standard of living for many people in the United States and Europe.

The Industrial Revolution also saw the rise of vast inequalities between countries that were industrialized and those that were not. As some nations embraced technology and saw increased wealth and goods, others maintained their ways; as the gap widened, the nonindustrialized nations fell further behind. Some social researchers, such as Walt Rostow (1916-2003), suggest that the disparity also resulted from power differences. Applying a critical sociological perspective, he asserts that industrializing nations took advantage of the resources of traditional nations. As industrialized nations became rich, other nations became poor (Rostow, 1960).

Sociologists studying global stratification analyze economic comparisons between nations. Income, purchasing power, and wealth are used to calculate global stratification. Global stratification also compares the quality of life that a country's population can have.

Poverty levels have been shown to vary greatly. The poor in wealthy countries like Canada or Europe are much better off than the poor in less-industrialized countries such as Mali or India. In 2002 the United Nations implemented the Millennium Project, an attempt to cut poverty worldwide by the year 2015. To reach the project's goal, planners in 2006 estimated that industrialized nations must set aside 0.7 percent of their gross national income — the total value of the nation's goods and services, plus or minus income received from and sent to other nations — to aid in developing countries (Landler & Sanger, 2009; Millennium Project, 2006). The project was successful in reaching its target of cutting extreme poverty by half — the number of people living on $1.25/day or less — but fell slightly short of halving the number of people suffering from hunger. Undernourishment in developing regions fell from 23.3% to 12.9% (United Nations, 2015).

Neoliberalism and Globalization

As we have seen earlier in this chapter, the growing inequality in Canada can be seen as a product in a shift in government policy from a welfare state model of redistribution of resources to a neoliberal model of free market distribution of resources. This transition does not take place in a vacuum, however. Just as global capitalism is an economic system characterized by constant change, so too is the relationship between global capitalism and national state policy. Throughout the 19th and first half of the 20th century, the role of the state in the wealthy Northern countries was typically limited to providing the legal mechanisms and enforcement to protect private property. Capitalism itself was for the most part regulated by competition until stock market crash of 1929 and the Great Depression of the 1930s. From then on, an awareness grew that the capacity for producing commodities had far exceeded the ability of people to buy them (Harvey, 1989). The economic model of Fordism, adopted in the wealthy Northern countries, offered a solution to the crisis by creating a system of intensive mass production (maximum use of machinery and minute divisions of labour), cheap



Figure 9.19. Luxury vacation resorts can contribute to a poorer country's economy. This one, in Jamaica, attracts middle and upper-middle class people from wealthier nations. The resort is a source of income and provides jobs for local people. Just outside its borders, however, are poverty-stricken neighbourhoods. (Photo courtesy of gailf548/ Flickr)

products, high wages, and mass consumption. This system required a disciplined work force and labour peace, however, which is one reason why states began to take a different role in the economy.

The post-World War II labour-management compromise or "accord" involved the recognition and institutionalization of labour unions, the mediation of the state in capital/labour disputes, the use of taxes and Keynesian economic policy to address economic recessions, and the gradual roll out of social safety net provisions. This set of policies collectively became known as the welfare state. In a high wage/high consumption economy, the ability of individuals to continue to consume even when misfortune struck was paramount, so unemployment insurance, pensions, health care, and disability provisions were important components of the new accord. The accord also reaffirmed the rights of private property or capital to introduce new technology, to reorganize production as they saw fit, and to invest wherever they pleased. Therefore, it was not a system of *economic* democracy or socialism. Nevertheless, the claims of full employment, continued prosperity, and the creation of a "just society" appeared plausible within the confines of the capitalist economic system.

When Fordism and the welfare state system began to break down in the late 1960s and early 1970s, the relationship between the state and the economy began to change again. In step with the development of the post-Fordist economy of lean production, precarious employment, and niche market consumption, the state began to withdraw from its guarantee of providing universal social services and social security. **Neoliberalism** is the term used to define the new rationality of government, which abandons the interventionist model of the welfare state to emphasize the use of "free market" mechanisms to regulate society.

Thus, neoliberalism is a set of policies in which the state reduces its role in providing public services, regulating industry, redistributing wealth, and protecting "the commons" — i.e., the collective property that exists for everyone to share (the environment, public and community facilities, airwaves, etc.). These policies are promoted by advocates as ways of addressing the "inefficiency of big government," the "burden on the taxpayer," the "need to cut red tape," and the "culture of entitlement and welfare dependency." In the place of "big" government, the virtues of the competitive marketplace are extolled. The market is said to promote more efficiency, lower costs, pragmatic decision making, non-favouritism, and a disciplined work ethic, etc.

Of course the facts often tell a different story. For example, government-funded health care in Canada costs far less per person than private health care in the United States (OECD, 2015). A country like Norway, which has a much higher



Figure 9.20. Pierre Trudeau (shown here in a photo from 1975) was elected leader of the Liberal Party at the 1968 convention — "Canada must be a just society" (Image courtesy of Wikimedia Commons)

rate of taxation than Canada, also has much lower unemployment, lower income inequality, lower inflation, better public services, a higher standard of living, and yet nevertheless has a globally competitive corporate sector with substantial state ownership and control (especially in the areas of oil and gas production, which is 80% owned by the Norwegian state) (Campbell, 2013). The policies of deregulation that caused the financial crisis of 2008, led even Alan Greenspan (b. 1926) the neoliberal economist and former Chairman of the United States Federal Reserve, to acknowledge that the model of free market "rationality" was flawed (CBC News, 2013). Since the financial crisis was a product of Greenspan's tenure at the Federal Reserve, and a result of the neoliberal policy of tax cuts and market deregulation that he advocated, his acknowledgment of the failure of free market rationality is significant.

As we noted earlier in this chapter, while the policies of government within the capitalist state have been changing, they are not occurring in a vacuum; rather, they are unfolding in the context of the developments of global capitalism. From its origins, capitalism has been global in scope. Marx and Engels described globalization in 1848:

> The bourgeoisie has through its exploitation of the world market given a cosmopolitan character to production and consumption in every country. To the great chagrin of Reactionists, it has drawn from under the feet of industry the national ground on which it stood. All old-established national industries have been destroyed or are daily being destroyed. They are dislodged by new industries, whose introduction becomes a life and death question for all civilized nations, by industries that no longer work up indigenous raw material, but raw material drawn from the remotest zones; industries whose products are consumed, not only at home, but in every quarter of the globe. In place of the old wants, satisfied by the production of the country, we find new wants, requiring for their satisfaction the products of distant lands and climes. In place of the old local and national seclusion and self-sufficiency, we have intercourse in every direction, universal inter-dependence of nations. (Marx & Engels, 1848/1977, p. 224)

The process of globalization intensified after World War II, and especially in the late 20th century with the introduction of new technologies that enabled vast volumes of capital and goods to circulate globally. The globalization of investment and production means that capital is increasingly able to shift production around the world to where labour costs are cheapest and profit greatest. In fact, as Ulrich Beck (1944-2015) put it, the effect of globalization has been to "conjure away distance" on a variety of different levels (2000, p. 20). He has argued that political actors no longer:

> live and act in the self-enclosed spaces of national states and their respective national societies. Globalization means that borders become markedly less relevant to everyday behaviour in the various dimensions of economics, information, ecology, technology, cross-cultural conflict and civil society. (2000, p. 20)

The terrain on which corporate, political, environmental, and other types of decisions are made is no longer confined to the boundaries of the state, which diminishes the ability of national governments to independently control economic and foreign policy. Thus, globalization represents a weakening of the autonomy and power of states. Neoliberalism is not only an internal domestic response to the economic crises and fall in the rates of profit, which began in the late 1960s, but also is a response to the ever more competitive global market for capital. Neoliberal policy is presented as a way to attract increasingly fickle global capital by making entire countries more "competitive." The result, as David Harvey (b. 1935) forcefully argues, has been to massively shift the balance of power to the economic elites of the global capitalist class (2005, pp. 16–19). As a result wealth has also been redistributed upwards.

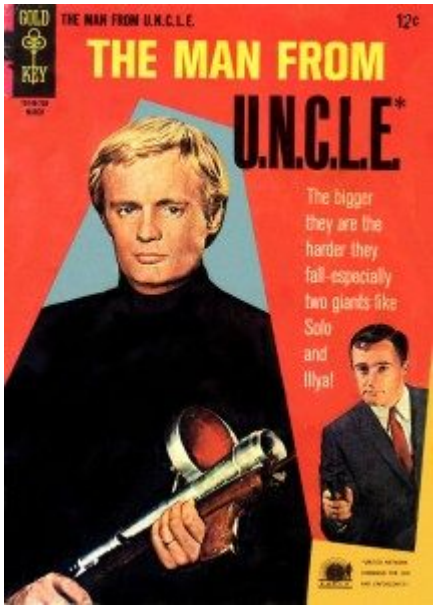


Figure 9.21. The Man from U.N.C.L.E. (United Network Command for Law and Enforcement) was a 1960s TV show based on the idea of a secret world organization dedicated to policing the entire globe (Image courtesy of James Vaughan/Flickr)

The changing configuration of global capitalism and politics has been described by some as the reemergence of **empire** (Hardt & Negri, 2000). Rather than a sovereign state system of unique and independent nation-states, in many ways the global order is better described today as a single unit within which state sovereignty has been transferred to a higher entity (Negri, 2004, p. 59). Numerous trade agreements have harmonized economies and removed borders that restrict the flow of capital and goods, and in recent decades frequent global "police actions" and trade embargoes have been enacted by various "coalitions of the willing" to enforce peace or intervene in domestic policy (in, for example, Iraq, Yugoslavia, Somalia, Afghanistan, Iran, Libya, and Syria, etc.). Similarly, the Kyoto Protocol on climate change or the Ottawa Treaty on landmines are examples of global initiatives that blur the boundaries of nation states. Empire in this sense refers to a new supra-national, global form of sovereignty whose "territory" is the entire globe. Antonio Negri (b. 1933) makes the point that this is not the same as saying that the world is dominated and controlled by the United States; rather, power is exercised through a "network" of dominant nation-states, supranational institutions (e.g., the UN, IMF, WTO, G8, NATO, etc.) and major capitalist corporations (Hardt & Negri, 2000; Negri, 2004). Empire, rather than being a form of imperialism like that which dominated in the era of colonialism, is a new political form that has emerged in response to the dynamics of global capitalism.

Basketball is one of the highest-paying professional sports. There is stratification even among teams. For example, the Minnesota Timberwolves hand out the lowest annual payroll, while the Los Angeles Lakers reportedly pay the highest. Kobe Bryant, a Lakers shooting guard who retired in 2016, was one of the highest paid athletes in the NBA, earning around $25 million a year (Basketballreference.com, 2011). Even within specific fields, layers are stratified and members are ranked.

In sociology, even an issue such as NBA salaries can be seen from various points of view. Functionalists will examine the purpose of such high salaries, while critical sociologists will study the exorbitant salaries as an unfair distribution of money. Social stratification takes on new meanings when it is examined from different sociological perspectives — functionalism, critical sociology, and interpretive sociology.

Functionalism

In sociology, the functionalist perspective examines how society's parts operate. According to functionalism, different aspects of society exist because they serve a needed purpose. What is the function of social stratification?

In 1945, sociologists Kingsley Davis (1908–1997) and Wilbert Moore (1914–1987) published the **Davis-Moore thesis**, which argued that the greater the functional importance of a social role, the greater must be the reward. The theory posits that social stratification represents the inherently unequal value of different work. Certain tasks in society are more valuable than others. Qualified people who fill those positions must be rewarded more than others.

According to Davis and Moore, a firefighter's job is more important than, for instance, a grocery store cashier's job. The cashier position does not require the same skill and training level as firefighting. Without the incentive of higher pay and better benefits, why would someone be willing to rush into burning buildings? If pay levels were the same, the firefighter might as well work as a grocery store cashier. Davis and Moore believed that rewarding more important work with higher levels of income, prestige, and power encourages people to work harder and longer.

Davis and Moore stated that, in most cases, the degree of skill required for a job determines that job's importance. They also stated that the more skill required for a job, the fewer qualified people there would be to do that job. Certain jobs, such as cleaning hallways or answering phones, do not require much skill. The employees don't need a college degree. Other work, like designing a highway system or delivering a baby, requires immense skill.

In 1953, Melvin Tumin (1919–1994) countered the Davis-Moore thesis in *Some Principles of Stratification: A Critical Analysis*. Tumin questioned what determined a job's degree of importance. The Davis-Moore thesis does not explain, he argued, why a media personality with little education, skill, or talent becomes famous and rich on a reality show or a campaign trail. The thesis also does not explain inequalities in the education system, or inequalities due to race or gender. Tumin believed social stratification prevented qualified people from attempting to fill roles (1953). For example, an underprivileged youth has less chance of becoming a scientist, no matter how smart he or she is, because of the relative lack of opportunity available.

The Davis-Moore thesis, though open for debate, was an early attempt to explain why stratification exists. The thesis states that social stratification is necessary to promote excellence, productivity, and efficiency, thus giving people something to strive for. Davis and Moore believed that the system serves society as a whole because it allows everyone to benefit to a certain extent.

Critical Sociology

Critical sociologists are deeply critical of social inequality, asserting that it benefits only some people not all of society. For instance, to a critical sociologist it seems problematic that after a long period of increasing equality of incomes from World War II to the 1970s, the wealthiest 1 percent of income earners have been increasing their share of the total income of Canadians from 7.7 percent in 1977 to 13.8 percent in 2007 (Yalnizyan, 2010). In 1982, the median income earner in the top 1 percent of incomes earned seven times more than the median income earner in the other 99 percent. In 2010, the median income earner in the top 1 percent earned ten times more. Moreover, while the median income for the top 1 percent increased from $191,600 to $283,000 in constant dollars (i.e., adjusted for inflation), the median income for the



Figure 9.22. "Towards the Dawn," a 1930s promotional poster for the Saskatchewan Co-operative Commonwealth Federation (CCF) [Long Description] (Image courtesy of the Co-operative Commonwealth Federation/ Wikimedia Commons)

bottom 99 percent only increased from $28,000 to $28,400 (Statistics Canada, 2013). Canada's richest 1 percent took almost a third (32 percent) of all growth in incomes 2007 (Yalnizyan, 2010).

Critical sociologists view this "great U-turn" in income equality over the 20th and 21st centuries as a product of both the ability of corporate elites to grant themselves huge salary and bonus increases and the shift toward neoliberal public policy and tax cuts. Rather than creating conditions in which wealth trickles down, tax cuts and neoliberal policies tremendously benefit the rich at the expense of the poor. This is an example of the way that stratification perpetuates inequality. Contrary to the analysis of functionalists, huge corporate bonuses continued to be awarded even when dysfunctional corporate and financial mismanagement of the economy led to the global financial crisis of 2008. Nor is it the case that corporate elites work harder to merit more rewards. Over the period of increasing inequality in income, the only group not working more weeks and hours in the paid workforce is the richest 10 percent of families (Yalnizyan, 2007).

Critical sociologists try to bring awareness to inequalities, such as how a rich society can have so many poor members. Many critical sociologists draw on the work of Karl Marx. During the 19th-century era of industrialization, Marx analyzed the way the owning class or capitalists raked in profits and got rich, while working-class proletarians earned skimpy wages and struggled to survive. With such opposing interests, the two groups were divided by differences of wealth and power. Marx saw workers experience deep exploitation, alienation, and misery resulting from class power (Marx, 1848). He also predicted that the growing collective impoverishment of the working class would lead them, through the leadership of unions, to recognize their common class interests. A common class "consciousness" uniting different types of labour would lead to the revolutionary conditions whereby the working class could throw off their "fetters" and overthrow the capitalists. With the abolition of private property (i.e., productive property) and collective ownership of the means of production, Marx imagined that class conflict could be ended forever. A "communist" society that abolished the private ownership of the means of production would be a true democracy. Marx did not live see the state socialist systems in the Soviet Union and elsewhere that called themselves communist but ended up replacing capitalist-based inequality with bureaucratic-based inequality.

Today, while working conditions have improved, critical sociologists believe that the strained working relationship between employers and employees still exists. Capitalists own the means of production, and a neoliberal political system is in place to make business owners rich and keep workers poor. Moreover, the privileged position of the middle classes has been steadily eroded by growing inequalities of wealth and income. Some sociologists argue that the middle class is becoming **proletarianized**, meaning that in terms of income, property, control over working conditions, and overall life chances, the middle class is becoming more and more indistinguishable from the wage-earning working class (Abercrombie & Urry, 1983). Nevertheless, according to critical sociologists, increasing social inequality is neither inevitable nor necessary.

Interpretive Sociology

Within interpretive sociology, symbolic interactionism is a theory that uses everyday interactions of individuals to explain society as a whole. Symbolic interactionism examines stratification from a micro-level perspective. This analysis strives to explain how people's social standing affects their everyday interactions.

In most communities, people interact primarily with others who share the same social standing. It is precisely because of social stratification that people tend to live, work, and associate with others like themselves, people who share their same income level, educational background, or racial background, and even tastes in food, music, and clothing. The built-in system of social stratification groups people together.

Symbolic interactionists also note that people's appearance reflects their perceived social standing. Housing, clothing, and transportation indicate social status, as do hairstyles, taste in accessories, and personal style. Pierre Bourdieu's (1930-2002) concept of **cultural capital** suggests that cultural "assets" such as education and taste are accumulated and passed down between generations in the same manner as financial capital or wealth (1984). This marks individuals from an early age by such things as knowing how to wear a suit or having an educated manner of speaking. In fact the children of parents with a postsecondary degree are 60 percent likely to attend university themselves, while the children of parents with less than a high school education have only a 32 percent chance of attending university (Shaienks & Gluszynski, 2007).

Cultural capital is capital also in the sense of an investment, as it is expensive and difficult to attain while providing access to better occupations. Bourdieu argued that the privilege accorded to those who hold cultural capital is a means of reproducing the power of the ruling classes. People with the "wrong" cultural attributes have difficulty attaining the same privileged status. Cultural capital becomes a key measure of distinction between social strata.



Figure 9.23. Imelda Marcos, the wife of the Philippine dictator Ferdinand Marcos, was reputed to be one of the ten wealthiest woman in the world in 1975. When her husband was deposed in 1986, the couple fled leaving behind 2,000 to 3,000 shoes from world renowned designers Ferragamo, Givenchy, Chanel, and Christian Dior. (Image courtesy of Vince Lamb/Flickr)

In the *Theory of the Leisure Class* (1899), Thorstein Veblen (1857-1929) described the activity of **conspicuous consumption** as the tendency of people to buy things as a display of status rather than out of need. Conspicuous consumption refers to buying certain products to make a social statement about status. Carrying pricey but eco-friendly water bottles could indicate a person's social standing. Some people buy expensive trendy sneakers even though they will never wear them to jog or play sports. A $17,000 car provides transportation as easily as a $100,000 vehicle, but the luxury car makes a social statement that the less-expensive car can't live up to. All of these symbols of stratification are worthy of examination by interpretive sociologists because their social significance is determined by the shared meanings they hold.

Key Terms

absolute poverty: A severe deprivation of basic human needs, including food, safe drinking water, sanitation facilities, health, shelter, education and information.

achieved status: A status received through individual effort or merits (eg. occupation, educational level, moral character, etc.).

ascribed status: A status received by virtue of being born into a category or group (eg. hereditary position, gender, race, etc.).

bourgeoisie: In capitalism, the owning class who live from the proceeds of owning or controlling productive property (capital assets like factories and machinery, or capital itself in the form of investments, stocks, and bonds).

caste system: A system in which people are born into a social standing that they will retain their entire lives.

class: A group who shares a common social status based on factors like wealth, income, education, and occupation.

class system: Social standing based on social factors and individual accomplishments.

class traits: The typical behaviours, customs, and norms that define each class, also called class markers.

conspicuous consumption: Buying and using products to make a statement about social standing.

cultural capital: Cultural assets in the form of knowledge, education, and taste that can be transferred intergenerationally.

Davis-Moore thesis: A thesis that argues some social stratification is a social necessity.

downward mobility: A lowering of one's social class.

empire: A new supra-national, global form of sovereignty whose territory is the entire globe.

endogamous marriages: Unions of people within the same social category.

equality of condition: A situation in which everyone in a society has a similar level of wealth, status, and power.

equality of opportunity: A situation in which everyone in a society has an equal chance to pursue economic or social rewards.

exogamous marriages: Unions of people from different social categories.

Gini Index: A measure of income inequality in which zero is absolute equality and one is absolute inequality.

global stratification: A comparison of the wealth, economic stability, status, and power of countries as a whole.

income: The money a person earns from work or investments.

intergenerational mobility: A difference in social class between different generations of a family.

intragenerational mobility: A difference in social class between different members of the same generation.

living wage: The income needed to meet a family's basic needs and enable them to participate in community life.

lumpenproletariat: In capitalism, the underclass of chronically unemployed or irregularly employed who are in and out of the workforce.

means of production: Productive property, including the things used to produce the goods and services needed for survival: tools, technologies, resources, land, workplaces, etc.

meritocracy: An ideal system in which personal effort—or merit—determines social standing.

neoliberalism: A set of policies in which the state reduces its role in providing public services, regulating industry, redistributing wealth, and protecting the commons while advocating the use of free market mechanisms to regulate society.

petite bourgeoisie: In capitalism, the class of small owners like shopkeepers, farmers, and contractors who own some property and perhaps employ a few workers but rely on their own labour to survive.

power: How many people a person must take orders from versus how many people a person can give orders to.

primogeniture: A law stating that all property passes to the firstborn son.

proletariat: Those who seek to establish a sustainable standard of living by maintaining the level of their wages and the level of employment in society.

proletarianization (the act of being proletarianized): The process in which the work conditions of the middle class increasingly resemble those of the traditional, blue-collar working class.

relative poverty: Living without the minimum amount of income or resources needed to be able to participate in the ordinary living patterns, customs, and activities of a society.

social differentiation: The division of people into categories based on socially significant characteristics, identities, and roles.

social inequality: The unequal distribution of valued resources, rewards, and positions in a society.

social mobility: The ability to change positions within a social stratification system.

social stratification: A socioeconomic system that divides society's members into categories ranking from high to low, based on things like wealth, power, and prestige.

socio-economic status (SES): A group's social position in a hierarchy based on income, education, and occupation.

standard of living: The level of wealth available to acquire material goods and comforts to maintain a particular socioeconomic lifestyle.

status: The degree of honour or prestige one has in the eyes of others.

status consistency: The consistency, or lack thereof, of an individual's rank across social categories like income, education, and occupation.

structural mobility: When societal changes enable a whole group of people to move up or down the class ladder.

upward mobility: An increase — or upward shift — in social class.

wealth: The value of money and assets a person has from, for example, inheritance.

Section Summary

9.1. What Is Social Inequality?

Stratification systems are either closed, meaning they allow little change in social position, or open, meaning they allow movement and interaction between the layers. A caste system is one in which social standing is based on ascribed status or birth. Class systems are open, with achievement playing a role in social position. People fall into classes based on factors like wealth, income, education, and occupation.

9.2. Social Inequality and Mobility in Canada

There are three main classes in Canada: the owning class, middle class, and traditional working class. Social mobility describes a shift from one social class to another. Class traits, also called class markers, are the typical behaviours, customs, and norms that define each class.

9.3. Global Stratification and Inequality

Global stratification compares the wealth, economic stability, status, and power of countries as a whole. By comparing income and productivity between nations, researchers can better identify global inequalities.

9.4. Theoretical Perspectives on Social Inequality

Social stratification can be examined from different sociological perspectives — functionalism, critical sociology, and symbolic interactionism. The functionalist perspective states that inequality serves an important function in aligning individual merit and motivation with social position. Critical sociologists observe that stratification promotes inequality, such as between rich business owners and exploited workers. Symbolic interactionists examine stratification from a micro-level perspective. They observe how social standing affects people's everyday interactions, particularly the tendency to interact with people of like status, and how the concept of "social class" is constructed and maintained through cultural distinctions of education and taste (or cultural capital) and conspicuous consumption.

Section Quiz

9.1. What Is Social Inequality?

1. What factor makes caste systems closed?

    1. They are run by secretive governments.
    2. People cannot change their social standings.
    3. Most have been outlawed.
    4. They exist only in rural areas.

2. What factor makes class systems open?

    1. They allow for movement between the classes.
    2. People are more open-minded.
    3. People are encouraged to socialize within their class.
    4. They do not have clearly defined layers.

3. Which of these systems allows for the most social mobility?

    1. Caste
    2. Monarchy
    3. Endogamy
    4. Class

4. Which person best illustrates opportunities for upward social mobility in Canada?

    1. First-shift factory worker
    2. First-generation college student
    3. Firstborn son who inherits the family business
    4. First-time interviewee who is hired for a job

5. Which statement illustrates low status consistency?

    1. A suburban family lives in a modest ranch home and enjoys a nice vacation each summer.
    2. A single mother receives welfare and struggles to find adequate employment.
    3. A college dropout launches an online company that earns millions in its first year.
    4. A celebrity actress owns homes in three countries.

6. Based on meritocracy, a physician's assistant would _____.

    1. Receive the same pay as all the other physician's assistants
    2. Be encouraged to earn a higher degree to seek a better position
    3. Most likely marry a professional at the same level
    4. Earn a pay raise for doing excellent work

7. In Canada, most people define themselves as _____.

    1. Middle class
    2. Upper class
    3. Lower class
    4. No specific class

8. Structural mobility occurs when _____.

1. An individual moves up the class ladder.
2. An individual moves down the class ladder.
3. A large group moves up or down the class ladder due to societal changes.
4. A member of a family belongs to a different class than his or her siblings.

9. The intergenerational behaviours, customs, education, taste, and norms associated with a class are known as _____.

1. class traits
2. power
3. prestige
4. underclass

10. Which of the following scenarios is an example of intergenerational mobility?

1. A janitor belongs to the same social class as his grandmother.
2. An executive belongs to a different class than her parents.
3. An editor shares the same social class as his cousin.
4. A lawyer belongs to a different class than her sister.

11. Occupational prestige means that jobs are _____.

1. all equal in status
2. not equally valued
3. assigned to a person for life
4. not part of a person's self-identity

9.3. Global Stratification and Inequality

12. Social stratification is a system that _____.

1. Ranks society members into categories
2. Destroys competition between society members
3. Allows society members to choose their social standing
4. Reflects personal choices of society members

13. Which graphic concept best illustrates the concept of social stratification?

1. Pie chart
2. Flag poles
3. Planetary movement
4. Pyramid

9.4. Theoretical Perspectives on Social Inequality

14. The basic premise of the Davis-Moore thesis is that the unequal distribution of rewards in social stratification _____.

1. Is an outdated mode of societal organization
2. Is an artificial reflection of society
3. Serves a purpose in society

4. Cannot be justified

15. Unlike Davis and Moore, Melvin Tumin believed that because of social stratification some qualified people were _____ higher-level job positions.

1. Denied the opportunity to obtain
2. Encouraged to train for
3. Often fired from
4. Forced into

16. Which statement represents stratification from the perspective of symbolic interactionism?

1. Men often earn more than women, even if working the same job.
2. After work, Pat, a janitor, feels more comfortable eating in a truck stop than a French restaurant.
3. Doctors earn more money because their job is more highly valued.
4. Teachers continue to struggle to keep benefits such as good retirement plans.

17. When Karl Marx said workers experience alienation, he meant that workers _____.

1. Must labour alone, without companionship
2. Do not feel connected to their work
3. Move from one geographical location to another
4. Have to put forth self-effort to get ahead

18. Conflict theorists view capitalists as those who _____.

1. Are ambitious
2. Fund social services
3. Spend money wisely
4. Get rich while workers stay poor

[Quiz answers at end of chapter]

Short Answer

9.1. What Is Social Inequality?

1. Track the social stratification of your family tree. Did the social standing of your parents differ from the social standing of your grandparents and great-grandparents? What social traits were handed down by your forebears? Are there any exogamous marriages in your history? Does your family exhibit status consistencies or inconsistencies?
2. What defines communities that have a low-status consistency? What are the ramifications, both positive and negative, of cultures with low-status consistency? Think of specific examples to support your ideas.
3. Review the concept of stratification. Now choose a group of people you have observed and been a part of — for example, cousins, high school friends, classmates, sport teammates, or coworkers. How does the structure of the social group you chose adhere to the concept of stratification?

9.2. Social Inequality and Mobility in Canada

1. Which social class do you and your family belong to? Are you in a different social class than your grandparents and great-grandparents? Does your class differ from your social standing and, if so, how? What aspects of your societal situation establish you in a social class?
2. What class traits define your peer group? For example, what speech patterns or clothing trends do you and your friends share? What cultural elements, such as taste in music or hobbies, define your peer group? How do you see this set of class traits as different from other classes either above or below yours?
3. Provide examples of class inequality and of status inequality in your community. Are there examples in which class inequality differs from status inequality? What is the significance of these differences?

9.3. Global Stratification and Inequality

1. Why is it important to understand and be aware of global stratification? Make a list of specific issues that are related to global stratification. For inspiration, turn on a news channel or read the newspaper. Next, choose a topic from your list and look at it more closely. Who is affected by this issue? How is the issue specifically related to global stratification?
2. Compare a family that lives in a grass hut in Ethiopia to a Canadian family living in a mobile home in Canada. Assuming both exist at or below the poverty levels established by their country, how are the families' lifestyles and economic situations similar and how are they different?

9.4. Theoretical Perspectives on Social Inequality

1. Analyze the Davis-Moore thesis. Do you agree with Davis and Moore? Does social stratification play an important function in society? What examples can you think of that support the thesis? What examples can you think of that refute the thesis?
2. Do you see any evidence of the growing gap between the rich and poor in Canada? What evidence do you see of the relative decline in wealth and income of the middle class? Does growing inequality affect you personally? What do you think the broader implications are?

Further Research

9.1. What Is Social Inequality?

The New York Times investigated social stratification in their series of articles called "Class Matters." The online accompaniment to the series includes an interactive graphic called "How Class Works," which tallies four factors — occupation, education, income, and wealth — and places an individual within a certain class and percentile. What class describes you? Test your class rank on the interactive site: http://www.nytimes.com/packages/html/national/20050515_CLASS_GRAPHIC/index_03.html

9.2. Social Inequality and Mobility in Canada

Mark Ackbar made a documentary about social class and the rise of the corporation called *The Corporation*. The filmmakers interviewed corporate insiders and critics. The accompanying website is full of information, resource guides, and study guides to the film.: http://thecorporation.com/.

9.3. Global Stratification and Inequality

Nations Online refers to itself as "among other things, a more or less objective guide to the world, a statement for the peaceful, nonviolent coexistence of nations." The website provides a variety of cultural, financial, historical, and ethnic information on countries and peoples throughout the world: http://www.nationsonline.org/oneworld/first.shtml

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Solutions to Section Quiz

1 B, | 2 A, | 3 D, | 4 B, | 5 C, | 6 D, | 7 A, | 8 C, | 9 A, | 10 B, | 11 B, | 12 A, | 13 D, | 14 C, | 15 A, | 16 B, | 17 B, | 18 D, [Return to Quiz]

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Long Description

Figure 9.22 Long Description: A family walks up a road towards the rising sun. The sun is labeled “CCF” with the suns rays saying, “Prosperity, justice, democracy, unity, equality, freedom, security.” .

Chapter 10. Global Inequality



Figure 10.1. The Millennium Development Goals (MDGs) were an ambitious start to the 21st century. [Long Description] (Photo courtesy of U.S. Mission Geneva/Flickr)

Learning Objectives

10.1. Global Stratification and Classification

- Describe global stratification.
- Understand how different classification systems have developed.
- Use terminology from Wallerstein's world systems approach.
- Explain the World Bank's classification of economies.

10.2. Global Wealth and Poverty

- Understand the differences between relative, absolute, and subjective poverty.
- Describe the economic situation of some of the world's most impoverished areas.
- Explain the cyclical impact of the consequences of poverty.

10.3. Theoretical Perspectives on Global Stratification

- Describe the modernization and dependency theory perspectives on global stratification.

Introduction to Global Inequality

In 2000, the world entered a new millennium. In the spirit of a grand-scale New Year's resolution, it was a time for lofty aspirations and dreams of changing the world. It was also the time of the Millennium Development Goals (MDGs), a series of ambitious goals set by UN member nations. The MDGs, as they became known, sought to provide a practical and specific plan for eradicating extreme poverty around the world. Nearly 200 countries signed on, and they worked to

create a series of 21 targets with 60 indicators, with an ambitious goal of reaching them by 2015. The goals spanned eight categories:

1. To eradicate extreme poverty and hunger
2. To achieve universal primary education
3. To promote gender equality and empower women
4. To reduce child mortality
5. To improve maternal health
6. To combat HIV/AIDS, malaria, and other diseases
7. To ensure environmental sustainability
8. To develop a global partnership for development (United Nations, 2010)

There's no question that these were well-thought-out objectives to work toward. Many years later, what has happened? As of the 2010 Outcome Document, much progress has been made toward some MDGs, while others are still lagging far behind. Goals related to poverty, education, child mortality, and access to clean water have seen much progress. But these successes show a disparity: some nations have seen great strides made, while others have seen virtually no progress. Improvements have been erratic, with hunger and malnutrition increasing from 2007 through 2009, undoing earlier achievements. Employment has also been slow to progress, as has a reduction in HIV infection rates, which have continued to outpace the number of people getting treatment. The mortality and health care rates for mothers and infants also show little advancement. Even in the areas that made gains, the successes are tenuous. And with the global recession having slowed both institutional and personal funding, the attainment of the goals is very much in question (United Nations, 2010). As we consider the global effort to meet these ambitious goals, we can think about how the world's people have ended up in such disparate circumstances. How did wealth become concentrated in some nations? What motivates companies to globalize? Is it fair for powerful countries to make rules that make it difficult for less-powerful nations to compete on the global scene? How can we address the needs of the world's population?

10.1. Global Stratification and Classification

Just as North America's wealth is increasingly concentrated among its richest citizens while the middle class slowly disappears, **global inequality** involves the concentration of resources in certain nations, significantly affecting the opportunities of individuals in poorer and less powerful countries. But before we delve into the complexities of global inequality, let us consider how the three major sociological perspectives might contribute to our understanding of it.

The functionalist perspective is a macroanalytical view that focuses on the way that all aspects of society are integral to the continued health and viability of the whole. A functionalist might focus on why we have global inequality and what social purposes it serves. This view might assert, for example, that we have global inequality because some nations are better than others at adapting to new technologies and profiting from a globalized economy, and that when core nation companies locate in peripheral nations, they expand the local economy and benefit the workers. Many models of modernization and development are functionalist, suggesting that societies with modern cultural values and beliefs are able to achieve economic development while traditional cultural values and beliefs hinder development. Cultures are either functional or dysfunctional for the economic development of societies.

Critical sociology focuses on the creation and reproduction of inequality. A critical sociologist would likely address the systematic inequality created when core nations exploit the resources of peripheral nations. For example, how many Canadian companies move operations offshore to take advantage of overseas workers who lack the constitutional protection and guaranteed minimum wages that exist in Canada? Doing so allows them to maximize profits, but at what cost?

The symbolic interaction perspective studies the day-to-day impact of global inequality, the meanings individuals attach to global stratification, and the subjective nature of poverty. Someone applying this view to global inequality might focus on understanding the difference between what someone living in a core nation defines as poverty (relative poverty, defined as being unable to live the lifestyle of the average person in your country) and what someone living in a peripheral nation defines as poverty (absolute poverty, defined as being barely able, or unable, to afford basic necessities, such as food).

Global Stratification

While stratification in Canada refers to the unequal distribution of resources among individuals, **global stratification** refers to this unequal distribution among nations. There are two dimensions to this stratification: gaps between nations and gaps within nations. When it comes to global inequality, both economic inequality and social inequality may concentrate the burden of poverty among certain segments of the Earth's population (Myrdal, 1970). As the table below illustrates, people's life expectancy depends heavily on where they happen to be born.

Table 10.1. Statistics such as infant mortality rates and life expectancy vary greatly by country of origin. (Central Intelligence Agency, 2011)

Country	Infant Mortality Rate	Life Expectancy
Canada	4.9 deaths per 1,000 live births	81 years
Mexico	17.2 deaths per 1,000 live births	76 years
Democratic Republic of Congo	78.4 deaths per 1,000 live births	55 years

Most of us are accustomed to thinking of global stratification as economic inequality. For example, we can compare China's average worker's wage to Canada's average wage. Social inequality, however, is just as harmful as economic discrepancies. Prejudice and discrimination — whether against a certain race, ethnicity, religion, or the like — can create and aggravate conditions of economic equality, both within and between nations. Think about the inequity that existed for decades within the nation of South Africa. Apartheid, one of the most extreme cases of institutionalized and legal racism, created a social inequality that earned it the world's condemnation. When looking at inequity between nations, think also about the disregard of the crisis in Darfur by most Western nations. Since few citizens of Western nations identified with the impoverished, non-white victims of the genocide, there has been little push to provide aid.

Gender inequity is another global concern. Consider the controversy surrounding female genital mutilation. Nations that practise this female circumcision procedure defend it as a longstanding cultural tradition in certain tribes and argue that the West should not interfere. Western nations, however, decry the practice and are working to stop it.

Inequalities based on sexual orientation and gender identity exist around the globe. According to Amnesty International, a number of types of crimes are committed against individuals who do not conform to traditional gender roles or sexual orientations (however those are culturally defined). From culturally sanctioned rape to state-sanctioned executions, the abuses are serious. These legalized and culturally accepted forms of prejudice and discrimination exist everywhere — from the United States to Somalia to Tibet — restricting the freedom of individuals and often putting their lives at risk (Amnesty International, 2012).

Global Classification

A major concern when discussing global inequality is how to avoid an ethnocentric bias implying that less developed nations want to be like those who have attained postindustrial global power. Terms such as "developing" (nonindustrialized) and "developed" (industrialized) imply that nonindustrialized countries are somehow inferior, and must improve to participate successfully in the global economy, a label indicating that all aspects of the economy cross national borders. We must take care in how we delineate different countries. Over time, terminology has shifted to make way for a more inclusive view of the world.

Cold War Terminology

Cold War terminology was developed during the Cold War era (1945–1980) when the world was divided between capitalist and communist economic systems (and their respective geopolitical aspirations). Familiar and still used by many, it involves classifying countries into first world, second world, and third world nations based on respective economic development and standards of living. When this nomenclature was developed, capitalistic democracies such as the United States, Canada, and Japan were considered part of the **first world**. The poorest, most undeveloped countries were referred to as the **third world** and included most of sub-Saharan Africa, Latin America, and Asia. The **second world** was the socialist world or Soviet bloc: industrially developed but organized according to a state socialist or communist model of

political economy. Later, sociologist Manual Castells (1998) added the term **fourth world** to refer to stigmatized minority groups that were denied a political voice all over the globe (indigenous minority populations, prisoners, and the homeless, for example).

Also during the Cold War, global inequality was described in terms of economic development. Along with developing and developed nations, the terms "less-developed nation" and "underdeveloped nation" were used. **Modernization theory** suggested that societies moved through natural stages of development as they progressed toward becoming developed societies (i.e., stable, democratic, market oriented, and capitalist). The economist Walt Rustow (1960) provided a very influential schema of development when he described the linear sequence of developmental stages: *traditional society* (agrarian based with low productivity); *pre-take off society* (state formation and shift to industrial production, expansion of markets, and generation of surplus); *take-off* (rapid self-sustained economic growth and reinvestment of capital in the economy); *maturity* (a modern industrialized economy, highly capitalized and technologically advanced); *the age of high mass-consumption* (shift from basic goods to "durable" goods (TVs, cars, refrigerators, etc.), and luxury goods, general prosperity, egalitarianism). Like most versions of modernization theory, Rustow's schema describes a linear process of development culminating in the formation of democratic, capitalist societies. It was clearly in line with Cold War ideology, but it also echoed widely held beliefs about the idea of social progress as an evolutionary process.

However, as "natural" as these stages of development were taken to be, they required creation, securing, protection, and support. This was the era when the idea of geopolitical *noblesse oblige* (first-world responsibility) took root, suggesting that the so-called developed nations should provide foreign aid to the less-developed and underdeveloped nations in order to raise their standard of living.

Immanuel Wallerstein: World Systems Approach

Wallerstein's (1979) world systems approach uses an economic and political basis to understand global inequality. Development and underdevelopment were not stages in a natural process of gradual modernization, but the product of power relations and colonialism. He conceived the global economy as a complex historical system supporting an economic hierarchy that placed some nations in positions of power with numerous resources and other nations in a state of economic subordination. Those that were in a state of subordination faced significant obstacles to mobilization.

Core nations are dominant capitalist countries, highly industrialized, technological, and urbanized. For example, Wallerstein contends that the United States is an economic powerhouse that can support or deny support to important economic legislation with far-reaching implications, thus exerting control over every aspect of the global economy and exploiting both semi-peripheral and peripheral nations. The free trade agreements such as the North American Free Trade Agreement (NAFTA) are examples of how a core nation can leverage its power to gain the most advantageous position in the matter of global trade.

Peripheral nations have very little industrialization; what they do have often represents the outdated castoffs of core nations, the factories and means of production owned by core nations, or the resources exploited by core nations. They typically have unstable government and inadequate social programs, and they are economically dependent on core nations for jobs and aid. There are abundant examples of countries in this category. Check the label of your jeans or sweatshirt and see where it was made. Chances are it was a peripheral nation such as Guatemala, Bangladesh, Malaysia, or Colombia. You can be sure the workers in these factories, which are owned or leased by global core nation companies, are not enjoying the same privileges and rights as Canadian workers.

Semi-peripheral nations are in-between nations, not powerful enough to dictate policy but nevertheless acting as a major source for raw material. They are an expanding middle-class marketplace for core nations, while also exploiting peripheral nations. Mexico is an example, providing abundant cheap agricultural labour to the United States and Canada, and supplying goods to the North American market at a rate dictated by U.S. and Canadian consumers without the constitutional protections offered to U.S. or Canadian workers.

World Bank Economic Classification by Income

While there is often criticism of the World Bank, both for its policies and its method of calculating data, it is still a common source for global economic data. When using the World Bank categorization to classify economies, the measure of GNI, or gross national income, provides a picture of the overall economic health of a nation. **Gross national income** equals all

goods and services plus net income earned outside the country by nationals and corporations headquartered in the country doing business out of the country, measured in U.S. dollars. In other words, the GNI of a country includes not only the value of goods and services inside the country, but also the value of income earned outside the country if it is earned by foreign nationals or foreign businesses. That means that multinational corporations that might earn billions in offices and factories around the globe are considered part of a core nation's GNI if they have headquarters in the core nations. Along with tracking the economy, the World Bank tracks demographics and environmental health to provide a complete picture of whether a nation is high income, middle income, or low income.

High-Income Nations

The World Bank defines high-income nations as having a GNI of at least $12,276 per capita. It separates out the OECD (Organisation for Economic and Co-operative Development) countries, a group of 34 nations whose governments work together to promote economic growth and sustainability. According to the Work Bank (2011), in 2010, the average GNI of a high-income nation belonging to the OECD was $40,136 per capita; on average, 77% of the population in these nations was urban. Some of these countries include Canada, the United States, Germany, and the United Kingdom (World Bank, 2011). In 2010, the average GNI of a high-income nation that did *not* belong to the OECD was $23,839 per capita and 83% was urban. Examples of these countries include Saudi Arabia and Qatar (World Bank, 2011).

There are two major issues facing high-income countries: capital flight and deindustrialization. **Capital flight** refers to the movement (flight) of capital from one nation to another, as when General Motors, Ford, and Chrysler close Canadian factories in Ontario and open factories in Mexico. **Deindustrialization**, a related issue, occurs as a consequence of capital flight, as no new companies open to replace jobs lost to foreign nations. As expected, global companies move their industrial processes to the places where they can get the most production with the least cost, including the costs for building infrastructure, training workers, shipping goods, and, of course, paying employee wages. This means that as emerging economies create their own industrial zones, global companies see the opportunity for existing infrastructure and much lower costs. Those opportunities lead to businesses closing the factories that provide jobs to the middle-class within core nations and moving their industrial production to peripheral and semi-peripheral nations.

Capital Flight, Outsourcing, and Jobs in Canada



Figure 10.2. This old General Motors plant in Oshawa, Ontario, is a victim of auto industry outsourcing. (Photo courtesy of Rick Harris/Flickr)

As mentioned above, capital flight describes jobs and infrastructure moving from one nation to another. Look at the manufacturing industries in Ontario. Ontario has been the traditional centre of manufacturing in Canada since the 19th century. At the turn of the 21st century, 18% of Ontario's labour market was made up of manufacturing jobs in industries like automobile manufacturing, food processing, and steel production. At the end of 2013, only 11% of the labour force worked in manufacturing. Between 2000 and 2013, 290,000 manufacturing jobs were lost (Tiessen, 2014). Often the culprit is portrayed as the high value of the Canadian dollar compared to the American dollar. Because of the high value of Canada's oil exports, international investors have driven up the value of the Canadian dollar in a process referred to as Dutch disease, the relationship between an increase in the development of natural resources and a decline in manufacturing. Canadian-manufactured products are too expensive as a result. However, this is just another way of

describing the general process of capital flight to locations that have cheaper manufacturing costs and cheaper labour. Since the introduction of the North American free trade agreements (the Free Trade Agreement (FTA) in 1988 and the North American Free Trade Agreement (NAFTA) in 1994), the ending of the tariff system that protected branch plant manufacturing in Canada has enabled U.S. companies to shift production to low-wage regions south of the border and in Mexico.

Capital flight also occurs when services (as opposed to manufacturing) are relocated. Chances are if you have called the tech support line for your cell phone or internet provider, you have spoken to someone halfway across the globe. This professional might tell you her name is Susan or Joan, but her accent makes it clear that her real name might be Parvati or Indira. It might be the middle of the night in that country, yet these service providers pick up the line saying, "good morning," as though they are in the next town over. They know everything about your phone or your modem, often using a remote server to log in to your home computer to accomplish what is needed. These are the workers of the 21st century. They are not on factory floors or in traditional sweatshops; they are educated, speak at least two languages, and usually have significant technology skills. They are skilled workers, but they are paid a fraction of what similar workers are paid in Canada. For Canadian and multinational companies, the equation makes sense. India and other semi-peripheral countries have emerging infrastructures and education systems to fill their needs, without core nation costs.

As services are relocated, so are jobs. In Canada, unemployment is high. Many university-educated people are unable to find work, and those with only a high school diploma are in even worse shape. We have, as a country, outsourced ourselves out of jobs, and not just menial jobs, but white-collar work as well. But before we complain too bitterly, we must look at the culture of consumerism that Canadians embrace. A flat screen television that might have cost $1,000 a few years ago is now $350. That cost saving has to come from somewhere. When Canadians seek the lowest possible price, shop at big box stores for the biggest discount they can get, and generally ignore other factors in exchange for low cost, they are building the market for outsourcing. And as the demand is built, the market will ensure it is met, even at the expense of the people who wanted that television in the first place.



Figure 10.3. Is this international call centre the wave of the future? (Photo courtesy of Vilma.com/Flickr)

Middle-Income Nations

The World Bank defines lower middle income countries as having a GNI that ranges from $1,006 to $3,975 per capita and upper middle income countries as having a GNI ranging from $3,976 to $12,275 per capita. In 2010, the average GNI of an upper middle income nation was $5,886 per capita with a population that was 57% urban. Brazil, Thailand, China, and Namibia are examples of middle-income nations (World Bank, 2011).

Perhaps the most pressing issue for middle-income nations is the problem of debt accumulation. As the name suggests,

debt accumulation is the buildup of external debt, when countries borrow money from other nations to fund their expansion or growth goals. As the uncertainties of the global economy make repaying these debts, or even paying the interest on them, more challenging, nations can find themselves in trouble. Once global markets have reduced the value of a country's goods, it can be very difficult to manage the debt burden. Such issues have plagued middle-income countries in Latin America and the Caribbean, as well as East Asian and Pacific nations (Dogruel and Dogruel, 2007). By way of example, even in the European Union, which is composed of more core nations than semi-peripheral nations, the semi-peripheral nations of Italy, Portugal, and Greece face increasing debt burdens. The economic downturns in these countries are threatening the economy of the entire European Union.

Low-Income Nations

The World Bank defines low-income countries as nations having a GNI of $1,005 per capita or less in 2010. In 2010, the average GNI of a low-income nation was $528 and the average population was 796,261,360, with 28% located in urban areas. For example, Myanmar, Ethiopia, and Somalia are considered low-income countries. Low-income economies are primarily found in Asia and Africa, where most of the world's population lives (World Bank, 2011). There are two major challenges that these countries face: women are disproportionately affected by poverty (in a trend toward a global feminization of poverty) and much of the population lives in absolute poverty. In some ways, the term **global feminization** of poverty says it all: around the world, women are bearing a disproportionate percentage of the burden of poverty. This means more women live in poor conditions, receive inadequate health care, bear the brunt of malnutrition and inadequate drinking water, and so on. Throughout the 1990s, data indicated that while overall poverty rates were rising, especially in peripheral nations, the rates of impoverishment increased nearly 20% more for women than for men (Mogadham, 2005). Why is this happening? While there are myriad variables affecting women's poverty, research specializing in this issue identifies three causes:

1. The expansion of female-headed households
2. The persistence and consequences of intra-household inequalities and biases against women
3. The implementation of neoliberal economic policies around the world (Mogadham, 2005)

In short, this means that within an impoverished household, women are more likely to go hungry than men; in agricultural aid programs, women are less likely to receive help than men; and often, women are left taking care of families with no male counterpart.

10.2. Global Wealth and Poverty



Figure 10.4. How poor is poor for these beggar children in Vietnam? (Photo courtesy of Augapfel/Flickr)

What does it mean to be poor? Does it mean being a single mother with two kids in Toronto, waiting for her next paycheque before she can buy groceries? Does it mean living with almost no furniture in your apartment because your income does not allow for extras like beds or chairs? Or does it mean the distended bellies of the chronically malnourished throughout the peripheral nations of sub-Saharan Africa and South Asia? Poverty has a thousand faces and a thousand gradations; there is no single definition that pulls together every part of the spectrum. You might feel you are poor if you can't afford cable television or your own car. Every time you see a fellow student with a new laptop and smartphone you might feel that you, with your ten-year-old desktop computer, are barely keeping up. However, someone else might look at the clothes you wear and the calories you consume and consider you rich.

Types of Poverty

Social scientists define global poverty in different ways, taking into account the complexities and the issues of relativism described above. **Relative poverty** is a state of living where people can afford necessities but are unable to meet their society's average standard of living. They are unable to participate in society in a meaningful way. People often disparage "keeping up with the Joneses" — the idea that you must keep up with the neighbours' standard of living to not feel deprived. But it is true that you might feel "poor" if you are living without a car to drive to and from work, without any money for a safety net should a family member fall ill, and without any "extras" beyond just making ends meet. Contrary to relative poverty, people who live in **absolute poverty** lack even the basic necessities, which typically include adequate food, clean water, safe housing, and access to health care. Absolute poverty is defined by the World Bank (2011) as when someone lives on less than a dollar a day. A shocking number of people — 88 million — live in absolute poverty, and close to 3 billion people live on less than $2.50 a day (Shah, 2011). If you were forced to live on $2.50 a day, how would you do it? What would you deem worthy of spending money on, and what could you do without? How would you manage the necessities — and how would you make up the gap between what you need to live and what you can afford?



Figure 10.5. Slums in India illustrate absolute poverty all too well. (Photo courtesy of Emmanuelle Dyan/Flickr)

Subjective poverty describes poverty that is composed of many dimensions; it is subjectively present when your actual income does not meet your expectations and perceptions. With the concept of subjective poverty, the poor themselves have a greater say in recognizing when it is present. In short, subjective poverty has more to do with how a person or a family defines themselves. This means that a family subsisting on a few dollars a day in Nepal might think of themselves as doing well, within their perception of normal. However, a Westerner travelling to Nepal might visit the same family and see extreme need.

The Underground Economy Around the World

What do the driver of an unlicensed speedy cab in St. Catharines, a piecework seamstress working from her home

in Mumbai, and a street tortilla vendor in Mexico City have in common? They are all members of the **underground economy**, a loosely defined unregulated market unhindered by taxes, government permits, or human protections. Official statistics before the 2008 worldwide recession posit that the underground economy accounted for over 50% of non-agricultural work in Latin America; the figure went as high as 80% in parts of Asia and Africa (Chen, 2001). A recent article in the *Wall Street Journal* discusses the challenges, parameters, and surprising benefits of this informal marketplace. The wages earned in most underground economy jobs, especially in peripheral nations, are a pittance — a few rupees for a handmade bracelet at a market, or maybe 250 rupees (around C$4.50) for a day's worth of fruit and vegetable sales (Barta, 2009). But these tiny sums mark the difference between survival and extinction for the world's poor.

The underground economy has never been viewed very positively by global economists. After all, its members do not pay taxes, do not take out loans to grow their businesses, and rarely earn enough to put money back into the economy in the form of consumer spending. But according to the International Labour Organization (an agency of the United Nations), some 52 million people worldwide will lose their jobs due to the 2008 recession. And while those in core nations know that unemployment rates and limited government safety nets can be frightening, it is nothing compared to the loss of a job for those barely eking out an existence. Once that job disappears, the chance of staying afloat is very slim.

Within the context of this recession, some see the underground economy as a key player in keeping people alive. Indeed, an economist at the World Bank credits jobs created by the informal economy as a primary reason why peripheral nations are not in worse shape during this recession. Women in particular benefit from the informal sector. The majority of economically active women in peripheral nations are engaged in the informal sector, which is somewhat buffered from the economic downturn. The flip side, of course, is that it is equally buffered from the possibility of economic growth.

Even in Canada, the informal economy exists, although not on the same scale as in peripheral and semi-peripheral nations. It might include under-the-table nannies, gardeners, and housecleaners, as well as unlicensed street vendors and taxi drivers. There are also those who run informal businesses, like daycares or salons, from their houses. Analysts estimate that this type of of labour may make up 10 to 13.5% of the overall Canadian economy (Schneider and Enste, 2000), a number that will likely grow as companies reduce head counts, leaving more workers to seek other options. In the end, the article suggests that, whether selling medicinal wines in Thailand or woven bracelets in India, the workers of the underground economy at least have what most people want most of all: a chance to stay afloat (Barta, 2009).

Who Are the Impoverished?

Who are the impoverished? Who is living in absolute poverty? Most of us would guess correctly that the richest countries typically have the fewest people. Compare Canada, which possesses a relatively small slice of the population pie and owns a large slice of the wealth pie, with India. These disparities have the expected consequence. The poorest people in the world are women in peripheral and semi-peripheral nations. For women, the rate of poverty is particularly exacerbated by the pressure on their time. In general, time is one of the few luxuries the very poor have, but study after study has shown that women in poverty, who are responsible for all family comforts as well as any earnings they can make, have less of it. The result is that while men and women may have the same rate of economic poverty, women are suffering more in terms of overall well-being (Buvinić, 1997). It is harder for females to get credit to expand businesses, to take the time to learn a new skill, or to spend extra hours improving their craft so as to be able to earn at a higher rate.

Africa

The majority of the poorest countries in the world are in Africa. That is not to say there is not diversity within the countries of that continent; countries like South Africa and Egypt have much lower rates of poverty than Angola and Ethiopia, for instance. Overall, African income levels have been dropping relative to the rest of the world, meaning that Africa as a whole is getting relatively poorer. Exacerbating the problem, 2011 saw a drought in northeast Africa that brought starvation to many in the region.

Why is Africa in such dire straits? Much of the continent's poverty can be traced to the availability of land, especially arable land (land that can be farmed). Centuries of struggle over land ownership have meant that much useable land has been ruined or left unfarmed, while many countries with inadequate rainfall have never set up an infrastructure to irrigate. Many of Africa's natural resources were long ago taken by colonial forces, leaving little agricultural and mineral wealth on the continent.

Further, African poverty is worsened by civil wars and inadequate governance that are the result of a continent re-imagined with artificial colonial borders and leaders. Consider the example of Rwanda. There, two ethnic groups cohabited with their own system of hierarchy and management until Belgians took control of the country in 1915 and rigidly confined members of the population into two unequal ethnic groups. While, historically, members of the Tutsi group held positions of power, the involvement of Belgians led to the Hutu's seizing power during a 1960s revolt. This ultimately led to a repressive government and genocide against Tutsis that left hundreds of thousands of Rwandans dead or living in diaspora (U.S. Department of State, 2011c). The painful rebirth of a self-ruled Africa has meant many countries bear ongoing scars as they try to see their way toward the future (World Poverty, 2012a).

Asia

While the majority of the world's poorest countries are in Africa, the majority of the world's poorest people are in Asia. As in Africa, Asia finds itself with disparity in the distribution of poverty, with Japan and South Korea holding much more wealth than India and Cambodia. In fact, most poverty is concentrated in South Asia. One of the most pressing causes of poverty in Asia is simply the pressure that the size of the population puts on its resources. In fact, many believe that China's success in recent times has much to do with its draconian population control rules. According to the U.S. State Department, China's market-oriented reforms have contributed to its significant reduction of poverty and the speed at which it has experienced an increase in income levels (U.S. Department of State, 2011b). However, every part of Asia has felt the global recession, from the poorest countries whose aid packages were hit, to the more industrialized ones whose own industries slowed down. These factors make the poverty on the ground unlikely to improve any time soon (World Poverty, 2012b).

Latin America

Poverty rates in some Latin American countries like Mexico have improved recently, in part due to investment in education. But other countries like Paraguay and Peru continue to struggle. Although there is a large amount of foreign investment in this part of the world, it tends to be higher-risk speculative investment (rather than the more stable long-term investment Europe often makes in Africa and Asia). The volatility of these investments means that the region has been unable to leverage them, especially when mixed with high interest rates for aid loans. Further, internal political struggles, illegal drug trafficking, and corrupt governments have added to the pressure (World Poverty, 2012c).

Argentina is one nation that suffered from increasing debt load in the early 2000s, as the country tried to fight hyperinflation by fixing the peso to the U.S. dollar. The move hurt the nation's ability to be competitive in the world market and ultimately created chronic deficits that could only be financed by massive borrowing from other countries and markets. By 2001, so much money was leaving the country that there was a financial panic, leading to riots and ultimately, the resignation of the president (U.S. Department of State, 2011a).

The True Cost of a T-Shirt

Most of us do not pay too much attention to where our favourite products are made. And certainly when you are shopping for a cheap T-shirt, you probably do not turn over the label, check who produced the item, and then research whether or not the company has fair labour practices. In fact it can be very difficult to discover where exactly the items we use everyday have come from. Nevertheless, the purchase of a T-shirt involves us in a series of social relationships that ties us to the lives and working conditions of people around the world.

On April 24, 2013, the Rana Plaza building in Dhaka, Bangladesh, collapsed killing 1,129 garment workers. The building, like 90% of Dhaka's 4,000 garment factories, was structurally unsound. Garment workers in Bangladesh work under unsafe conditions for as little as $38 a month so that North American consumers can purchase T-shirts in the fashionable colours of the season for as little as $5. The workers at Rana Plaza were in fact making clothes for the Joe Fresh label — the signature popular Loblaw brand — when the building collapsed. Having been put on the defensive for their overseas sweatshop practices, companies like Loblaw have pledged to improve working conditions in their suppliers' factories, but compliance has proven difficult to ensure because of the increasingly complex web of globalized production (MacKinnon and Strauss, 2013).



Figure 10.6. This protester seeks to bring attention to the issue of sweatshops. (Photo courtesy of Ohio AFL-CIO Labor 2008/Flickr)

At one time, the garment industry was important in Canada, centred on Spadina Avenue in Toronto and Chabanel Street in Montreal. But over the last two decades of globalization, Canadian consumers have become increasingly tied through popular retail chains to a complex network of outsourced garment production that stretches from China, through Southeast Asia, to Bangladesh and Sri Lanka. The early 1990s saw the economic opening of China when suddenly millions of workers were available to produce and manufacture consumer items for Westerners at a fraction of the cost of Western production. Manufacturing that used to take place in Canada moved overseas. Over the ensuing years, the Chinese began to outsource production to regions with even cheaper labour: Vietnam, Cambodia, Sri Lanka, and Bangladesh. The outsourcing was outsourced. The result is that when a store like Loblaw places an order, it usually works through agents who in turn source and negotiate the price of materials and production from competing locales around the globe.

Most of the T-shirts that we wear in Canada today begin their life in the cotton fields of arid west China, which owe their scale and efficiency to the collectivization projects of centralized state socialism. However, as the cost of Chinese labour has incrementally increased since the 1990s, the Chinese have moved into the role of connecting Western retailers and designers with production centres elsewhere. In a global division of labour, if agents organize the sourcing, production chain and logistics, Western retailers can focus their skill and effort on retail marketing. It was in this context that Bangladesh went from having a few dozen garment factories to several thousand. The garment industry now accounts for 80% of Bangladesh's export earnings. Unfortunately, although there are legal safety regulations and inspections in Bangladesh, the rapid expansion of the industry has exceeded the ability of underfunded state agencies to enforce them.

The globalization of production makes it difficult to follow the links between the purchasing of a T-shirt in a Canadian store and the chain of agents, garment workers, shippers, and agricultural workers whose labour has gone into producing it and getting it to the store. Our lives are tied to this chain each time we wear a T-shirt, yet the history of its production and the lives it has touched are more or less invisible to us. It becomes even more difficult to do something about the working conditions of those global workers when even the retail stores are uncertain about where the shirts come form. There is no international agency that can enforce compliance with safety or working standards. Why do you think worker safety standards and factory building inspections have to be imposed by government regulations rather than being simply an integral part of the production process? Why does it seem normal that the issue of worker safety in garment factories is set up in this way? Why does this make it difficult to resolve or address the issue?

The fair trade movement has pushed back against the hyper-exploitation of global workers and forced stores like Loblaw to try to address the unsafe conditions in garment factories like Rana Plaza. Organizations like the Better Factories Cambodia program inspect garment production regularly in Cambodia, enabling stores like Mountain Equipment Co-op

to purchase reports on the factory chains it relies on. After the Rana Plaza disaster, Loblaw signed an Accord of Fire and Building Safety in Bangladesh to try to ensure safety compliance of their suppliers. However the bigger problem seems to originate with our desire to be able to purchase a T-shirt for $5 in the first place.

Consequences of Poverty



Figure 10.7. For this child at a refugee camp in Ethiopia, poverty and malnutrition are a way of life. (Photo courtesy of DFID – UK Department for International Development/Flickr)

Not surprisingly, the consequences of poverty are often also causes. The poor experience inadequate health care, limited education, and the inaccessibility of birth control. Those born into these conditions are incredibly challenged in their efforts to break out since these consequences of poverty are also causes of poverty, perpetuating a cycle of disadvantage.

According to sociologists Neckerman and Torche (2007) in their analysis of global inequality studies, the consequences of poverty are many. They have divided the consequences into three areas. The first, termed "the sedimentation of global inequality," relates to the fact that once poverty becomes entrenched in an area, it is typically very difficult to reverse. As mentioned above, poverty exists in a cycle where the consequences and causes are intertwined. The second consequence of poverty is its effect on physical and mental health. Poor people face physical health challenges, including malnutrition and high infant mortality rates. Mental health is also detrimentally affected by the emotional stresses of poverty, with relative deprivation carrying the strongest effect. Again, as with the ongoing inequality, the effects of poverty on mental and physical health become more entrenched as time goes on. Neckerman and Torche's third consequence of poverty is the prevalence of crime. Cross-nationally, crime rates are higher, particularly with violent crime, in countries with higher levels of income inequality (Fajnzylber, Lederman, and Loayza 2002).

Slavery

While most of us are accustomed to thinking of slavery in terms of pre–Civil War America, modern-day slavery goes hand in hand with global inequality. In short, slavery refers to any time people are sold, treated as property, or forced to work for little or no pay. Just as in pre–Civil War America, these humans are at the mercy of their employers. **Chattel slavery**, the form of slavery practised in the pre–Civil War American South, is when one person owns another as property. Child slavery, which may include child prostitution, is a form of chattel slavery. **Debt bondage**, or bonded labour, involves the poor pledging themselves as servants in exchange for the cost of basic necessities like transportation, room, and board. In this scenario, people are paid less than they are charged for room and board. When travel is involved, people can arrive in debt for their travel expenses and be unable to work their way free, since their wages do not allow them to ever get ahead.

The global watchdog group Anti-Slavery International recognizes other forms of slavery: human trafficking (where people are moved away from their communities and forced to work against their will), child domestic work and

child labour, and certain forms of servile marriage, in which women are little more than chattel slaves (Anti-Slavery International, 2012).

10.3. Theoretical Perspectives on Global Stratification

As with any social issue, global or otherwise, there are a variety of theories that scholars develop to study the topic. The two most widely applied perspectives on global stratification are modernization theory and dependency theory.

Modernization Theory

According to modernization theory, low-income countries are affected by their lack of industrialization and can improve their global economic standing through:

1. An adjustment of cultural values and attitudes to work
2. Industrialization and other forms of economic growth (Armer and Katsillis, 2010)

Critics point out the inherent ethnocentric bias of this theory. It supposes all countries have the same resources and are capable of following the same path. In addition, it assumes that the goal of all countries is to be as "developed" as possible (i.e., like the model of capitalist democracies provided by Canada or the United States). There is no room within this theory for the possibility that industrialization and technology are not the best goals.

There is, of course, some basis for this assumption. Data show that core nations tend to have lower maternal and child mortality rates, longer lifespans, and less absolute poverty. It is also true that in the poorest countries, millions of people die from the lack of clean drinking water and sanitation facilities, which are benefits most of us take for granted. At the same time, the issue is more complex than the numbers might suggest. Cultural equality, history, community, and local traditions are all at risk as modernization pushes into peripheral countries. The challenge, then, is to allow the benefits of modernization while maintaining a cultural sensitivity to what already exists.

Dependency Theory

Dependency theory was created in part as a response to the Western-centric mindset of modernization theory. It states that global inequality is primarily caused by core nations (or high-income nations) exploiting semi-peripheral and peripheral nations (or middle-income and low-income nations), creating a cycle of dependence (Hendricks, 2010). In the period of colonialism, core or metropolis nations created the conditions for the underdevelopment of peripheral or hinterland nations through a **metropolis-hinterland relationship**. The resources of the hinterlands were shipped to the metropolises where they were converted into manufactured goods and shipped back for consumption in the hinterlands. The hinterlands were used as the source of cheap resources and were unable to develop competitive manufacturing sectors of their own.

Dependency theory states that as long as peripheral nations are dependent on core nations for economic stimulus and access to a larger piece of the global economy, they will never achieve stable and consistent economic growth. Further, the theory states that since core nations, as well as the World Bank, choose which countries to make loans to, and for what they will loan funds, they are creating highly segmented labour markets that are built to benefit the dominant market countries.

At first glance, it seems this theory ignores the formerly low-income nations that are now considered middle-income nations and are on their way to becoming high-income nations and major players in the global economy, such as China. But some dependency theorists would state that it is in the best interests of core nations to ensure the long-term usefulness of their peripheral and semi-peripheral partners. Following that theory, sociologists have found that entities are more likely to outsource a significant portion of a company's work if they are the dominant player in the equation; in other words, companies want to see their partner countries healthy enough to provide work, but not so healthy as to establish a threat (Caniels, Roeleveld, and Roeleveld, 2009).

Globalization Theory

Globalization theory approaches global inequality by focusing less on the relationship between dependent and core nations, and more on the international flows of capital investment and disinvestment in an increasingly integrated world market.

Since the 1970s, capital accumulation has taken place less and less in the context of national economies. Rather, as we saw in the example of the garment industry, capital circulates on a global scale, leading to a *global* reordering of inequalities both between nations and within nations. The production, distribution, and consumption of goods and services are administratively and technologically integrated on a worldwide basis. Effectively, we no longer live and act in the self-enclosed spaces of national states.

The core components of the "globalization project" (McMichael, 2012) — the project to transform the world into a single seamless market — are the imposition of open "free" markets across national borders, the deregulation of trade and investment, and the privatization of public goods and services. Development has been redefined from the model of nationally managed economic growth to "participation in the world market" according to the World Bank's *World Development Report 1980* (cited in McMichael, 2012, pp. 112-113). The global economy as a whole, not modernized national economies, emerges as the site of development. Within this model, the world and its resources are reorganized and managed on the basis of the free trade of goods and services and the free circulation of capital by democratically unaccountable political and economic elite organizations like the G7, the WTO (World Trade Organization), GATT (General Agreement on Trade and Tariffs), the World Bank and IMF (International Monetary Fund), and the various international measures used to liberalize the global economy (the 1995 Agreement on Agriculture, Trade-Related Investment Measures (TRIMs), Trade-Related Intellectual Property Rights (TRIPs), and the General Agreement on Trade in Services (GATS)).

According to globalization theory, the outcome of the globalization project has been the redistribution of wealth and poverty on a global scale. Outsourcing shifts production to low-wage enclaves, displacement leads to higher unemployment rates in the traditionally wealthy global north, people migrate from rural to urban areas and "slum cities" and illegally from poor countries to rich countries, while large numbers of workers simply become redundant to global production and turn to informal, casual labour. The **anti-globalization movement** has emerged as a counter-movement to define an alternative, non-corporate global project based on environmental sustainability, food sovereignty, labour rights, and democratic accountability.

Factory Girls

We've examined functionalist and conflict theorist perspectives on global inequality, as well as modernization and dependency theories. How might a symbolic interactionist approach this topic?

The book *Factory Girls: From Village to City in Changing China*, by Leslie T. Chang, provides this opportunity. Chang follows two young women (Min and Chunming) who are employed at a handbag plant. They help manufacture coveted purses and bags for the global market. As part of the growing population of young people who are leaving behind the homesteads and farms of rural China, these female factory workers are ready to enter the urban fray and pursue an income much higher than they could have earned back home.

Although Chang's study is based in a town many have never heard of (Dongguan), this city produces one-third of all shoes on the planet (Nike and Reebok are major manufacturers here) and 30% of the world's computer disk drives, in addition to a wide range of apparel (Chang, 2008).

But Chang's focus is less centred on this global phenomenon on a large scale and more concerned with how it affects these two women. As a symbolic interactionist would do, Chang examines the daily lives and interactions of Min and Chunming — their workplace friendships, family relations, gadgets, and goods — in this evolving global space where young women can leave tradition behind and fashion their own futures. What she discovers is that the women are definitely subject to conditions of hyper-exploitation, but are also disembedded from the rural, Confucian, traditional culture in a manner that provides them with unprecedented personal freedoms. They go from the traditional family affiliations and narrow options of the past to life in a "perpetual present." Friendships are fleeting and fragile, forms of life are improvised and sketchy, and everything they do is marked by the goals of upward mobility, resolute individualism, and an obsession with prosperity. Life for the women factory workers in Dongguan is an adventure, compared to their fate in rural village life, but one characterized by gruelling work, insecurity, isolation, and loneliness. Chang writes, "Dongguan was a place without memory."

Key Terms

absolute poverty: The state where one is barely able, or unable, to afford basic necessities.

anti-globalization movement: A global counter-movement based on principles of environmental sustainability, food sovereignty, labour rights, and democratic accountability that challenges the corporate model of globalization.

capital flight: The movement (flight) of capital from one nation to another, via jobs and resources.

chattel slavery: A form of slavery in which one person owns another.

core nations: Dominant capitalist countries.

debt accumulation: The buildup of external debt, wherein countries borrow money from other nations to fund their expansion or growth goals.

debt bondage: When people pledge themselves as servants in exchange for money for passage, and are subsequently paid too little to regain their freedom.

deindustrialization: The loss of industrial production, usually to peripheral and semi-peripheral nations where the costs are lower.

dependency theory: Theory stating that global inequity is due to the exploitation of peripheral and semi-peripheral nations by core nations.

first world: A term from the Cold War era that is used to describe industrialized capitalist democracies.

fourth world: A term that describes stigmatized minority groups who have no voice or representation on the world stage.

global feminization: A pattern that occurs when women bear a disproportionate percentage of the burden of poverty.

global inequality: The concentration of resources in core nations and in the hands of a wealthy minority.

global stratification: The unequal distribution of resources between countries.

gross national income (GNI): The income of a nation calculated based on goods and services produced, plus income earned by citizens and corporations headquartered in that country.

metropolis-hinterland relationship: The relationship between nations when resources of the hinterlands are shipped to the metropolises where they are converted into manufactured goods and shipped back to the hinterlands for consumption.

modernization theory: A theory that low-income countries can improve their global economic standing by industrialization of infrastructure and a shift in cultural attitudes toward work.

peripheral nations: Nations on the fringes of the global economy, dominated by core nations, with very little industrialization.

relative poverty: The state of poverty where one is unable to live the lifestyle of the average person in the country.

second world: A term from the Cold War era that describes nations with moderate economies and standards of living.

semi-peripheral nations: In-between nations, not powerful enough to dictate policy but acting as a major source of raw materials and providing an expanding middle-class marketplace.

subjective poverty: A state of poverty subjectively present when one's actual income does not meet one's expectations.

third world: A term from the Cold War era that refers to poor, nonindustrialized countries.

underground economy: An unregulated economy of labour and goods that operates outside of governance, regulatory systems, or human protections.

Section Summary

10.1. Global Stratification and Classification

Stratification refers to the gaps in resources both between nations and within nations. While economic equality is of great concern, so is social equality, like the discrimination stemming from race, ethnicity, gender, religion, and/or sexual orientation. While global inequality is nothing new, several factors, like the global marketplace and the pace of information sharing, make it more relevant than ever. Researchers try to understand global inequality by classifying it according to factors such as how industrialized a nation is, whether it serves as a means of production or as an owner, and what income it produces.

10.2. Global Wealth and Poverty

When looking at the world's poor, we first have to define the difference between relative poverty, absolute poverty, and subjective poverty. While those in relative poverty might not have enough to live at their country's standard of living, those in absolute poverty do not have, or barely have, basic necessities such as food. Subjective poverty has more to do with one's perception of one's situation. North America and Europe are home to fewer of the world's poor than Africa, which has highest number of poor countries, or Asia, which has the most people living in poverty. Poverty has numerous negative consequences, from increased crime rates to a detrimental impact on physical and mental health.

10.3. Theoretical Perspectives on Global Stratification

Modernization theory, dependency theory, and globalization theory are three of the most common lenses sociologists use when looking at the issues of global inequality. Modernization theory posits that countries go through evolutionary stages and that industrialization and improved technology are the keys to forward movement. Dependency theory sees modernization theory as Eurocentric and patronizing. With this theory, global inequality is the result of core nations creating a cycle of dependence by exploiting resources and labour in peripheral and semi-peripheral countries. Globalization theory argues that the division between the wealthy and the poor is now organized in the context of a single, integrated global economy rather than between core and peripheral nations.

Section Quiz

10.1. Global Stratification and Classification

1. A sociologist who focuses on the way that multinational corporations headquartered in core nations exploit the local workers in their peripheral nation factories is using a _____ perspective to understand the global economy.

    1. Functional
    2. Critical sociology
    3. Feminist
    4. Symbolic interactionist

2. A _____ perspective theorist might find it particularly noteworthy that wealthy corporations improve the quality of life in peripheral nations by providing workers with jobs, pumping money into the local economy, and improving transportation infrastructure.

    1. Functional
    2. Critical sociology
    3. Feminist
    4. Symbolic interactionist

3. A sociologist working from a symbolic interaction perspective would _____.

1. Study how inequality is created and reproduced
2. Study how corporations can improve the lives of their low-income workersTtry to understand how companies provide an advantage to high-income nations compared to low-income nations
3. Want to interview women working in factories to understand how they manage the expectations of their supervisors, make ends meet, and support their households on a day-to-day basis

4. France might be classified as which kind of nation?

1. Global
2. Core
3. Semi-peripheral
4. Peripheral

5. In the past, Canada manufactured clothes. Many clothing corporations have shut down their Canadian factories and relocated to China. This is an example of _____.

1. Conflict theory
2. OECD
3. Global inequality
4. Capital flight

10.2. Global Wealth and Poverty

6. Slavery in the pre–Civil War American South most closely resembled _____.

1. Chattel slavery
2. Debt bondage
3. Relative poverty
4. Peonage

7. Maya is a 12-year-old girl living in Thailand. She is homeless and often does not know where she will sleep or when she will eat. We might say that Maya lives in _____ poverty.

1. Subjective
2. Absolute
3. Relative
4. Global

8. Mike, a college student, rents a studio apartment. He cannot afford a television and lives on cheap groceries like dried beans and ramen noodles. Since he does not have a regular job, he does not own a car. Mike is living in _____.

1. Global poverty
2. Absolute poverty
3. Subjective poverty
4. Relative poverty

9. Faith has a full-time job and two children. She has enough money for the basics and can pay her rent each month, but she feels that, with her education and experience, her income should be enough for her family to live much better than they do. Faith is experiencing _____.

1. Global poverty
2. Subjective poverty
3. Absolute poverty
4. Relative poverty

10. In a B.C. town, a mining company owns all the stores and most of the houses. It sells goods to the workers at inflated prices, offers house rentals for twice what a mortgage would be, and makes sure to always pay the workers less than they need to cover food and rent. Once the workers are in debt, they have no choice but to continue working for the company, since their skills will not transfer to a new position. This most closely resembles _____.

1. Child slavery
2. Chattel slavery
3. Debt slavery
4. Servile marriage

10.3. Theoretical Perspectives on Global Stratification

11. One flaw in dependency theory is the unwillingness to recognize _____.

1. That previously low-income nations such as China have successfully developed their economies and can no longer be classified as dependent on core nations
2. That previously high-income nations such as China have been economically overpowered by low-income nations entering the global marketplace
3. That countries such as China are growing more dependent on core nations
4. That countries such as China do not necessarily want to be more like core nations

12. One flaw in modernization theory is the unwillingness to recognize_____.

1. That semi-peripheral nations are incapable of industrializing
2. That peripheral nations prevent semi-peripheral nations from entering the global market
3. Its inherent ethnocentric bias
4. The importance of semi-peripheral nations industrializing

13. If a sociologist says that nations evolve toward more advanced technology and more complex industry as their citizens learn cultural values that celebrate hard work and success, she is using _____ theory to study the global economy.

1. Modernization theory
2. Dependency theory
3. Globalization theory
4. Evolutionary dependency theory

14. If a sociologist points out that corporate interests dominate the global economy, in part by creating global trade agreements and eliminating international tariffs that will inevitably favour the ability of capital to invest in low wage regions, he or she is a _____.

1. Dependency theorist
2. Globalization theorist
3. Modernization theorist
4. Symbolic interactionist

15. Dependency theorists explain global inequality and global stratification by focusing on the way that _____.

1. Core nations and peripheral nations exploit semi-peripheral nations
2. Semi-peripheral nations exploit core nations
3. Peripheral nations exploit core nations
4. Core nations exploit peripheral nations

[Quiz answers at end of chapter]

Short Answer

10.1. Global Stratification and Classification

1. Consider the matter of rock-bottom prices at Walmart. What would a functionalist think of Walmart's model of squeezing vendors to get the absolute lowest prices so it can pass them along to core nation consumers?
2. Why do you think some scholars find Cold War terminology ("first world" and so on) objectionable?
3. Give an example of the feminization of poverty in core nations. How is it the same or different in peripheral nations?
4. Pretend you are a sociologist studying global inequality by looking at child labour manufacturing Barbie dolls in China. What do you focus on? How will you find this information? What theoretical perspective might you use?

10.2. Global Wealth and Poverty

1. Consider the concept of subjective poverty. Does it make sense that poverty is in the eye of the beholder? When you see a homeless person, is your reaction different if he or she is seemingly content rather than begging? Why?
2. Think of people among your family, your friends, or your classmates who are relatively unequal in terms of wealth. What is their relationship like? What factors come into play?
3. Go to your campus bookstore or visit its website. Find out who manufactures apparel and novelty items with your school's insignias. In what countries are these produced? Does your school adhere to any principles of fare trade?

10.3. Theoretical Perspectives on Global Stratification

1. There is much criticism that modernization theory is Eurocentric. Do you think dependency theory and globalization theory are also biased? Why or why not?
2. Compare and contrast modernization theory, dependency theory, and globalization theory. Which do you think is more useful for explaining global inequality? Explain, using examples.

Further Research

10.2. Global Wealth and Poverty

Students often think that Canada is immune to the atrocity of human trafficking. Check out the following link to learn more about trafficking in Canada: http://www.publicsafety.gc.ca/cnt/rsrcs/pblctns/ntnl-ctn-pln-cmbt/index-eng.aspx; You can also check out the Canadian Women's Foundation's efforts to end sex trafficking: http://www.canadianwomen.org/trafficking

10.3. Theoretical Perspectives on Global Stratification

For more information about global affairs, check the Munk School of Global Affairs website: http://munkschool.utoronto.ca/

Go to Naomi Klein's website for more information about the anti-globalization movement: http://www.naomiklein.org/main

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Solutions to Section Quiz

1 B, | 2 A, | 3 D, | 4 B, | 5 D, | 6 A, | 7 B, | 8 D, | 9 B, | 10 C, | 11 A, | 12 C, | 13 A, | 14 B, | 15 D, [Return to Quiz]

Image Attributions

Figure 10.2. Eve of Destruction by Rick Harris (https://www.flickr.com/photos/37153080@N00/62624493/) use under CC BY SA 2.0 (https://creativecommons.org/licenses/by-sa/2.0/)

Long Descriptions

Figure 10.1 Long description:

1. Eradicate extreme poverty and hunger.
2. Achieve universal primary education
3. Promote gender equality and empower women
4. Reduce child mortality
5. Improve maternal health
6. Combat HIV/AIDS, malaria, and other diseases
7. Ensure environmental sustainability
8. Develop a global partnership for development

[Return to Figure 10.1]

9

Chapter 11. Race and Ethnicity



Figure 11.1. The dastaar (turban) is a required article in the observance of the Sikh faith. Baltej Singh Dhillon (not shown here) was the first Sikh member of the RCMP to wear a turban on active duty. This sparked a major controversy in 1990, but today people barely bat an eye when they see a police officer wearing a turban. Race and ethnicity are part of the human experience. Do the signs of racial and ethnic diversity play a role in who we are and how we relate to one another? (Photo courtesy of Gurumustuk Singh/Flickr)

Learning Objectives

11.1. Racial, Ethnic, and Minority Groups

- Understand the difference between race and ethnicity.
- Define a majority group (dominant group).
- Define a minority group (subordinate group).

11.2. Stereotypes, Prejudice, and Discrimination

- Explain the difference between stereotypes, prejudice, discrimination, and racism.
- Identify different types of discrimination.

11.3. Theories of Race and Ethnicity

- Describe how major sociological perspectives view race and ethnicity.
- Identify examples of culture of prejudice.

11.4. Intergroup Relations and the Management of Diversity

- Explain different intergroup relations in terms of their relative levels of tolerance.
- Give historical and/or contemporary examples of each type of intergroup relation.

11.5. Race and Ethnicity in Canada

- Compare and contrast the different experiences of various ethnic groups in Canada.
- Apply theories of intergroup relations and race and ethnicity to different subordinate groups.

Introduction to Race and Ethnicity

Visible minorities are defined as "persons, other than Aboriginal peoples, who are non-Caucasian in race or non-white in colour" (Statistics Canada, 2013, p. 14). This is a contentious term, as we will see in this chapter, but it does give us a way to speak about the growing ethnic and racial diversity of Canada. The 2011 census noted that visible minorities made up 19.1% of the Canadian population, or almost one out of every five Canadians. This was up from 16.2% in the 2006 census (Statistics Canada, 2013). The three largest visible minority groups were South Asians (25%), Chinese (21.1%), and blacks (15.1%).

Going back to the 1921 census, only 0.8% of population were made up of people of Asian origin, whereas 0.2% of the population were black. Aboriginal Canadians made up 1.3% of the population. The vast majority of the population were Caucasians ("whites") of British or French ancestry. These figures did not change appreciably until after the changes to the Immigration Act in 1967, which replaced an immigration policy based on racial criteria with a point system based on educational and occupational qualifications (Li, 1996). The 2011 census reported that 78% of the immigrants who arrived in Canada between 2006 and 2011 were visible minorities (Statistics Canada, 2013).

Still, these figures do not really give a complete picture of racial and ethnic diversity in Canada. 96% of visible minorities live in cities, mainly Vancouver and Toronto, making these cities extremely diverse and cosmopolitan. In Vancouver, almost half the population (45.2%) is made up of visible minorities. Within Greater Vancouver, 70.4% of the residents of Richmond, 59.5% of the residents of Burnaby, and 52.6 of the residents of Surrey are visible minorities. In the Toronto area, where visible minorities make up 47% of the population, 72.3% of the residents of the suburb of Markham are visible minorities (Statistics Canada, 2013). In many parts of urban Canada, it is a misnomer to use the term visible minority, as the "minorities" are now in the majority.

Table 11.1. Visible minority population and top three visible minority groups, selected census metropolitan areas, Canada, 2011, p. 17. (Table courtesy of Statistics Canada's Immigration and Ethnocultural Diversity in Canada report [PDF])

[Skip Table]

Cities	Total Population	Visible Minority Population	Percentage	Top Three Visible Minority Groups
Canada	32,852,325	6,264,755	19.1%	South Asian, Chinese, Black
Toronto	5,521,235	2,596,420	47.0%	South Asian, Chinese, Black
Montréal	3,752,475	762,325	20.3%	Black, Arab, Latin American
Vancouver	2,280,695	1,030,335	45.2%	Chinese, South Asian, Filipino
Ottawa – Gatineau	1,215,735	234,015	19.2%	Black, Arab, Chinese
Calgary	1,199,125	337,420	28.1%	South Asian, Chinese, Filipino
Edmonton	1,139,585	254,990	22.4%	South Asian, Chinese, Filipino
Winnipeg	714,635	140,770	19.7%	Filipino, South Asian, Black
Hamilton	708,175	101,600	14.3%	South Asian, Black, Chinese

Source Statistics Canada, National Household Survey, 2011.

Projecting forward based on current trends, Statistics Canada estimates that by 2031, between 29 and 32% of the Canadian population will be visible minorities. Visible minority groups will make up 63% of the population of Toronto and 59% of the population of Vancouver (Statistics Canada, 2010). The outcome of these trends is that Canada has become a much more racially and ethnically diverse country over the 20th and 21st centuries. It will continue to become more diverse in the future.

In large part this has to do with immigration policy. Canada is a **settler society**, a society historically based on colonization through foreign settlement and displacement of Aboriginal inhabitants, so immigration is the major influence on population diversity. In the two decades following World War II, Canada followed an immigration policy that was explicitly race based. Prime Minister Mackenzie King's statement to the House of Commons in 1947 expressed this in what were, at the time, uncontroversial terms:

> There will, I am sure, be general agreement with the view that the people of Canada do not wish, as a result of mass immigration, to make a fundamental alteration in the character of our population. Large-scale immigration from the orient would change the fundamental composition of the Canadian population. Any considerable oriental immigration would, moreover, be certain to give rise to social and economic problems of a character that might lead to serious difficulties in the field of international relations. The government, therefore, has no thought of making any change in immigration regulations which would have consequences of the kind. (as cited in Li, 1996, pp. 163-164)

Today this would be a completely unacceptable statement from a Canadian politician. Immigration today is based on a non-racial point system. Canada defines itself as a multicultural nation that promotes and recognizes the diversity of its population. This does not mean, however, that Canada's legacy of institutional and individual prejudice and racism has been erased. Nor does it mean that the problems of managing a diverse population have been resolved.

In 1997, the United Nations Committee on the Elimination of Racial Discrimination criticized the Canadian government for using the term "visible minority," citing that distinctions based on race or colour are discriminatory (CBC, 2007). The term combines a diverse group of people into one category whether they have anything in common or not. What does it actually mean to be a member of a visible minority in Canada? What does it mean to be a member of the "non-visible" majority? What do these terms mean in practice?

11.1. Racial, Ethnic, and Minority Groups

While many students first entering a sociology classroom are accustomed to conflating the terms race, ethnicity, and

minority group, these three terms have distinct meanings for sociologists. The idea of race refers to superficial physical differences that a particular society considers significant, while ethnicity is a term that describes shared culture. And minority group describes groups that are subordinate, or lacking power in society regardless of skin colour or country of origin. For example, in modern history, the elderly might be considered a minority group due to a diminished status resulting from popular prejudice and discrimination against them. The World Health Organization's research on elderly maltreatment shows that 10% of nursing home staff admit to physically abusing an elderly person in the past year, and 40% admit to psychological abuse (2011). As a minority group, the elderly are also subject to economic, social, and workplace discrimination.

What Is Race?

Historically, the concept of race has changed across cultures and eras, eventually becoming less connected with ancestral and familial ties, and more concerned with superficial physical characteristics. In the past, theorists have posited categories of race based on various geographic regions, ethnicities, skin colours, and more. Their labels for racial groups have connoted regions (Mongolia and the Caucus Mountains, for instance) or denoted skin tones (black, white, yellow, and red, for example).

However, this typology of race developed during early racial science has fallen into disuse, and **racialization** (the social construction of race) is a far more common way of understanding racial categories. According to this school of thought, race is not biologically identifiable. Rather, certain groups become racialized through a social process that marks them for unequal treatment based on perceived physiological differences. When considering skin colour, for example, the social construction of race perspective recognizes that the relative darkness or fairness of skin is an evolutionary adaptation to the available sunlight in different regions of the world. Contemporary conceptions of race, therefore, which tend to be based on socioeconomic assumptions, illuminate how far removed modern race understanding is from biological qualities. In modern society, some people who consider themselves "white" actually have more melanin (a pigment that determines skin colour) in their skin than other people who identify as "black." Consider the case of the actress Rashida Jones. She is the daughter of a black man (Quincy Jones) but she does not play a black woman in her television or film roles. In some countries, such as Brazil, class is more important than skin colour in determining racial categorization. People with high levels of melanin in their skin may consider themselves "white" if they enjoy a middle-class lifestyle. On the other hand, someone with low levels of melanin in their skin might be assigned the identity of "black" if they have little education or money.

The social construction of race is also reflected in the way that names for racial categories change with changing times. It's worth noting that race, in this sense, is also a system of labelling that provides a source of identity — specific labels fall in and out of favour during different social eras. For example, the category "negroid," popular in the 19th century, evolved into the term "negro" by the 1960s, and then this term fell from use and was replaced with "black Canadian." The term was intended to celebrate the multiple identities that a black person might hold, but the word choice is an ambiguous one: It lumps together a large variety of ethnic groups under an umbrella term. Unlike the case in the United States where the term "African American" is common, most black Canadians immigrated from the Caribbean and retain ethnic roots from that area. Culturally they remain distinct from immigrants from sub-Saharan Africa or the descendants of the slaves brought to mainland North America. Some prefer to use the term "Afro-Caribbean Canadians" for that reason.

What Is Ethnicity?

Ethnicity is a term that describes shared culture — the practices, values, and beliefs of a group. This might include shared language, religion, and traditions, among other commonalities. Like race, the term ethnicity is difficult to describe and its meaning has changed over time. And like race, individuals may be identified or self-identify with ethnicities in complex, even contradictory, ways. For example, ethnic groups such as Irish, Italian, Russian, Jewish, and Serbian might all be groups whose members are predominantly included in the racial category "white." Conversely, the ethnic group British includes citizens from a multiplicity of racial backgrounds: black, white, Asian, and more, plus a variety of race combinations. These examples illustrate the complexity and overlap of these identifying terms. Ethnicity, like race, continues to be an identification method that individuals and institutions use today — whether through the census, affirmative action initiatives, non-discrimination laws, or simply in personal day-to-day relations.

What Are Minority Groups?

Sociologist Louis Wirth (1897-1952) defined a **minority group** as "any group of people who, because of their physical or cultural characteristics, are singled out from the others in the society in which they live for differential and unequal treatment, and who therefore regard themselves as objects of collective discrimination" (1945). The term minority connotes discrimination, and in its sociological use the term **subordinate** can be used interchangeably with the term minority, while the term **dominant** is often substituted for the group that's in the majority. These definitions correlate to the concept that the **dominant group** is that which holds the most power in a given society, while **subordinate groups** are those who lack power compared to the dominant group.

Note that being a numerical minority is not a characteristic of being a minority group; sometimes larger groups can be considered minority groups due to their lack of power. It is the lack of power that is the predominant characteristic of a minority, or subordinate group. For example, consider apartheid in South Africa, in which a numerical majority (the black inhabitants of the country) were exploited and oppressed by the white minority.

According to Charles Wagley (1913-1991) and Marvin Harris (1927-2001), a minority group is distinguished by five characteristics: (1) unequal treatment and less power over their lives, (2) distinguishing physical or cultural traits like skin colour or language, (3) involuntary membership in the group, (4) awareness of subordination, and (5) high rate of in-group marriage (1958). Additional examples of minority groups might include the LGBTQ community, religious practitioners whose faith is not widely practised where they live, and people with disabilities.

Scapegoat theory, developed initially from John Dollard's (1900-1980) frustration-aggression theory, suggests that the dominant group will displace their unfocused aggression onto a subordinate group (1939). History has shown us many examples of the scapegoating of a subordinate group. An example from the last century is the way that Adolf Hitler was able to use the Jewish people as scapegoats for Germany's social and economic problems. In Canada, eastern European immigrants were branded Bolsheviks and interned during the economic slump following World War I. In the United States, many states have enacted laws to disenfranchise immigrants; these laws are popular because they let the dominant group scapegoat a subordinate group. Many minority groups have been scapegoated for a nation's — or an individual's — woes.

Multiple Identities

Prior to the 20th century, racial intermarriage (referred to as miscegenation) was extremely rare, and in many places, illegal. In the United States, 41 of the 50 states at one time or another enacted legislation to prevent racial intermarriage. In Canada, there were no formal anti-miscegenation laws, though strong informal norms ensured that racial intermixing was extremely limited in scope. Thompson makes the case, however, that the various versions of the Indian Act, originally enacted in 1876, effectively worked on a racial level to restrict the marriage between Aboriginal and non-Aboriginal people (2009). A key part of the Act enumerated the various ways in which Aboriginal people could lose their status and, thus, their claim to Aboriginal land title and state provisions. Until its amendment in 1985, the most egregious section of the Act (Section 12.1.b) determined that an Indian woman who married a non-Indian man would lose her Indian status and her children's Indian status, whereas an Indian man who married a non-Indian woman would retain his status, as would his children. In this way, the thorny question of having multiple racial identities could be avoided.

The Métis are Canada's original exception to this rule. Prior to the full establishment of British colonial rule in Canada, racial intermarriage was encouraged in some areas to support the fur trade. The Métis formed a unique mixed-race culture of French fur traders and mostly Cree, Anishinabe, and Saulteaux people centred in the Red River settlement of what is now Manitoba. The progeny of liaisons between the Hudson's Bay Company's British traders and Aboriginal women were known as "half-breeds," a largely pejorative term both then and now. It is unfortunately a testament to the untenability of multiple identities in 19th century Canada that the attempt to establish and protect an independent Métis culture under the provisional government of Louis Riel (1844-1885) led to the violent suppression of the Métis in the Red River Rebellion of 1869 and the Northwest Rebellion of 1885. Despite the promises of the newly founded Canadian government, the Métis were swindled out of their land through a corrupt script system and displaced by a massive influx of Anglo-Saxon immigrants (Purich, 1988).

During the late modern era, the trend toward equal rights and legal protection against racism have steadily reduced



Figure 11.2. Golfer Tiger Woods has Chinese, Thai, African American, Native American, and Dutch heritage. Individuals with multiple ethnic backgrounds are becoming more common. (Photo courtesy of familymwr/Flickr)

the social stigma attached to racial exogamy (exogamy refers to marriage outside of one's core social unit). It is now common for the children of racially mixed parents to acknowledge and celebrate their various ethnic identities. Golfer Tiger Woods, for instance, has Chinese, Thai, African American, Native American, and Dutch heritage; he jokingly refers to his ethnicity as "Cablinasian," a term he coined to combine several of his ethnic backgrounds. In Canada the prevalence of multiple identities is captured in the 2011 *Statistics Canada National Household Survey*. While just over 19 million Canadians described themselves as having a single ethnic origin, (including almost 6 million who claimed a "Canadian" ethnic origin), almost 14 million Canadians described themselves as having a multiple ethnic origin (Statistics Canada, 2011). According to 2006 census data, 3.9% of all Canadian couples were "mixed unions," that is, couples made up of either a visible minority member and a non-visible minority member or two members from different visible minorities. This was up from 3.1% in 2001 and 2.6% in 1991 (Milan et al., 2010).

11.2. Stereotypes, Prejudice, and Discrimination

Stereotypes

The terms stereotype, prejudice, discrimination, and racism are often used interchangeably in everyday conversation. But when discussing these terms from a sociological perspective, it is important to define them: **Stereotypes** are oversimplified ideas about groups of people; **prejudice** refers to thoughts and feelings about those groups; while **discrimination** refers to actions toward them. **Racism** is a type of prejudice that involves set beliefs about a specific racial group.

As stated above, stereotypes are oversimplified ideas about groups of people. Stereotypes can be based on race, ethnicity,



Figure 11.3. Louis Riel was the son of a prominent French-Ojibwa father and French mother. He was executed in 1885 on the charge of high treason for his role in the Northwest Rebellion. This picture was taken at the time of his trial in 1885. (Photo courtesy of Wikimedia Commons)

age, gender, sexual orientation — almost any characteristic. They may be positive (usually about one's own group, such as when women suggest they are less likely to complain about physical pain) but are often negative (usually toward other groups, such as when members of a dominant racial group suggest that a subordinate racial group is stupid or lazy). In either case, the stereotype is a generalization that doesn't take individual differences into account.

Where do stereotypes come from? In fact new stereotypes are rarely created; rather, they are recycled from subordinate groups that have assimilated into society and are reused to describe newly subordinate groups. For example, many stereotypes that are currently used to characterize black people were used earlier in Canadian history to characterize Irish and eastern European immigrants.

Prejudice and Racism

Prejudice refers to beliefs, thoughts, feelings, and attitudes that someone holds about a group. A prejudice is not based on experience; instead, it is a prejudgment originating outside of actual experience. Racism is a type of prejudice that is used to justify the belief that one racial category is somehow superior or inferior to others. White supremacist groups are examples of racist organizations; their members' belief in white supremacy has encouraged hate crimes and hate speech for over a century.

Discrimination

While prejudice refers to biased *thinking*, discrimination consists of *actions* against a group of people. Discrimination can be based on age, religion, health, and other indicators. Race-based discrimination and anti-discrimination laws strive to address this set of social problems.

Discrimination based on race or ethnicity can take many forms, from unfair housing practices to biased hiring systems. Overt discrimination has long been part of Canadian history. Discrimination against Jews was typical until the 1950s. McGill University imposed quotas on the admission of Jewish students in 1920, a practice which continued in its medical faculty until the 1960s. As we saw in the Nova Scotia case of Viola Desmond in Chapter 7, Canada had also its own version

of American Jim Crow laws, which designated "whites only" areas in cinemas, public transportation, workplaces, etc. Both Ontario and Nova Scotia had racially segregated schools. It is interesting to note that while Viola Desmond was prosecuted for sitting in a whites only section of the cinema in Glasgow, Nova Scotia, she was in fact of mixed-race descent as her mother was white (Backhouse, 1994). These practices are unacceptable in Canada today.

However, discrimination cannot be erased from our culture just by enacting laws to abolish it. Even if a magic pill managed to eradicate racism from each individual's psyche, society itself would maintain it. Sociologist Émile Durkheim called racism "a social fact," meaning that it does not require the action of individuals to continue (1895). The reasons for this are complex and relate to the educational, criminal, economic, and political systems that exist.

For example, when a newspaper prints the race of individuals accused of a crime, it may enhance stereotypes of a certain minority. It is difficult to think of Somali Canadians, for example, without recalling the news reports of gang-related deaths in Toronto's social housing projects or the northern Alberta drug trade (Wingrove & Mackrael, 2012). Another example of racist practices is **racial steering**, in which real estate agents direct prospective homeowners toward or away from certain neighbourhoods based on their race. Racist attitudes and beliefs are often more insidious and hard to pin down than specific racist practices.

Prejudice and discrimination can overlap and intersect in many ways. To illustrate, here are four examples of how prejudice and discrimination can occur. *Unprejudiced nondiscriminators* are open-minded, tolerant, and accepting individuals. *Unprejudiced discriminators* might be those who, unthinkingly, practise sexism in their workplace by not considering females for certain positions that have traditionally been held by men. *Prejudiced nondiscriminators* are those who hold racist beliefs but don't act on them, such as a racist store owner who serves minority customers. *Prejudiced discriminators* include those who actively make disparaging remarks about others or who perpetuate hate crimes.

Discrimination can also involve the promotion of a group's status, such as occurs with white privilege. While most white people are willing to admit that non-white people live with a set of disadvantages due to the colour of their skin, very few white people are willing to acknowledge the benefits they receive simply by being white. **White privilege** refers to the fact that dominant groups often accept their experience as the normative (and hence, superior) experience. Failure to recognize this "normality" as race-based is an example of a dominant group's often unconscious racism. Feminist sociologist Peggy McIntosh described several examples of "white privilege." For instance, white women can easily find makeup that matches their skin tone, and white people can be assured that, most of the time, they will be dealing with authority figures of their own race (1988). How many other examples of white privilege can you think of?

Institutional Racism

Discrimination also manifests in different ways. The illustrations above are examples of individual discrimination, but other types exist. Institutional discrimination or **institutional racism** is when a societal system has developed with an embedded disenfranchisement of a group, such as Canadian immigration policies that imposed "head taxes" on Chinese immigrants in 1886 and 1904. Institutional racism refers to the way in which racial distinctions are used to organize the policy and practice of state, judicial, economic, and educational institutions. As a result these distinctions systematically reproduce inequalities along racial lines. They define what people can and cannot do based on racial characteristics. It is not necessarily the intention of these institutions to reproduce inequality, nor of the individuals who work in the institutions. Rather, inequality is the outcome of patterns of differential treatment based on racial or ethnic categorizations of people.

Clear examples of institutional racism in Canada can be seen in the Indian Act and immigration policy, as we have already noted. The effects of institutional racism can also be observed in the structures that reproduce income inequality for visible minorities and Aboriginal Canadians. The median income of Aboriginal people in Canada was 30% less than non-Aboriginal people in 2006 (Wilson & Macdonald, 2010). Rates of child poverty (using Statistics Canada's after-tax low-income measure) for all Aboriginal people in 2006 were at 40%, while rates for non-Indigenous, non-racialized, non-immigrant children were 12% (Macdonald & Wilson, 2013).

Institutional racism is also deeply problematic for visible minorities in Canada. This can be seen, for example, in the racialized characteristics of the economy. As described below, although labour participation rates are similar for racialized and non-racialized individuals, unemployment for racialized men, (and even more so or racialized women), is much hight than for their non-racialized counterparts. Moreover, income levels for racialized Canadians are much lower than for non-racialized Canadians (Block and Galabuzi, 2011). These substantial, statistically significant differences between racialized

and non-racialized Canadians indicate that economic institutions in Canada are systematically structured on the basis of racialized differences in the workforce rather than on the basis of individual qualities of workers or individual acts of prejudice of employers.



Figure 11.4. St. Joseph's Mission residential school near Williams Lake, B.C., circa 1890. (Photo courtesy of LibraryArchives/Flickr)

The residential school system was set up in the 19th century to educate and assimilate Aboriginal children into European culture. From 1883 until 1996, over 150,000 Aboriginal, Inuit, and Métis children were forcibly separated from their parents and their cultural traditions and sent to missionary-run residential schools. In the schools, they received substandard education and many were subject to neglect, disease, and abuse. Many children did not see their parents again, and thousands of children died at the schools. When they did return home they found it difficult to fit in. They had not learned the skills needed for life on reserves and had also been taught to be ashamed of their cultural heritage. Because the education at the residential schools was inferior they also had difficulty fitting into non-Aboriginal society.

The residential school system was part of a system of institutional racism because it was established on the basis of a distinction between the educational needs of Aboriginal and non-Aboriginal people. In introducing the policy to the House of Commons in 1883, Public Works Minister Hector Langevin argued, "In order to educate the children properly we must separate them from their families. Some people may say that this is hard but if we want to civilize them we must do that" (as cited in Truth and Reconciliation Commission, 2012, p. 5). The sad legacy of this "civilizing" mission has been several generations of severely disrupted Aboriginal families and communities; the loss of Aboriginal languages and cultural heritage; and the neglect, abuse, and traumatization of thousands of Aboriginal children. As the Truth and Reconciliation Commission concluded, the residential school system constituted a systematic assault on Aboriginal families, children, and cultures in Canada. Some have likened the policy and its aftermath to a cultural genocide (Truth and Reconciliation Commission of Canada, 2012).

While the last of the residential schools closed in 1996, the problem of Aboriginal education remains grave, with 40% of all Aboriginal people aged 20 to 24 having no high school diploma (61% of on-reserve Aboriginal people), compared to 13% of non-Aboriginals (Congress of Aboriginal Peoples, 2010). The impact of generations of children being removed from their homes to be educated in an underfunded and frequently abusive residential school system has been "joblessness, poverty, family violence, drug and alcohol abuse, family breakdown, sexual abuse, prostitution, homelessness, high rates of imprisonment, and early death" (Truth and Reconciliation Commission, 2012). Even with the public apology to residential school survivors and the inauguration of the Truth and Reconciliation Commission in 2008, the federal government, and the interests it represents, continue to refuse basic Aboriginal claims to title, self-determination, and control over their lands and resources.



Figure 11.5. Rastafarian in Toronto, Kensington Market, 2012. (Image courtesy of Eric Parker/ Flickr)

We also see the effects of institutional racism in the structures that reproduce income inequality for visible minorities or racialized Canadians. The median income of Aboriginal people in Canada was 30% less than non-Aboriginal people in 2006 (Wilson & Macdonald, 2010). In 2006, the rates of child poverty (using the after tax Low-Income Measure) for all Aboriginal people were at 40% (and 50% for Status Indians, 62% for Status Indians in Manitoba, and 64% for Status Indians in Saskatchewan), whereas the rates for non-Indigenous, non-racialized, non-immigrant children were 12% (Macdonald & Wilson, 2013).

Institutional racism is also deeply problematic for other visible minorities. In 2006, racialized individuals made up 16% of the Canadian population, up from less than 5% in the1980s. By 2031, this figure is expected to be 32% (Block & Galabuzi, 2011). In 2006, of these 5,068,100 individuals:

- 25% were South Asian
- 24% were Chinese
- 15.5% were Black or African Canadian
- 8.3% were Arab & West Asian
- 8.1% were Filipino
- 6% were Latin American

While labour *participation* rates in the economy are more or less equal for racialized and non-racialized individuals, racialized men are 24% more likely to be unemployed than non-racialized men. Racialized women are 48% more likely to be unemployed than non-racialized women (Block & Galabuzi, 2011). Moreover, racialized Canadians earned only 81.4% of the income that non-racialized Canadians earn because they tend to find work in insecure, temporary, and low paying jobs like call centres, security services, and janitorial services (Block & Galabuzi, 2011). Those identifying as Chinese earned 88.6% of the income of non-racialized Canadians; South Asians 83.3%; and Koreans, Latin Americans, and West Asians approximately 70% (Block & Galabuzi, 2011). According to Block and Galabuzi, these inequalities in income are not simply the effect of the time it takes immigrants to integrate into the society and economy. Table 11.2 (below) shows how the income inequality between racialized and non-racialized individuals remains substantial even into the third generation of immigrants.

Table 11.2. Average Employment Income for Racialized and Non-Racialized Canadians by Generation in 2005 (Table courtesy of Block & Galabuzi, 2011/CCPA)

[Skip Table]

Generation	*Racialized*		*Non-racialized*		*Differential (%)*	
	Men	**Women**	**Men**	**Women**	**Men**	**Women**
1st Generation	$45,388	$32,165	$66,078	$39,264	68.7%	81.9%
2nd Generation	$57,237	$42,804	$75,729	$46,391	75.6%	92.3%
3rd or more Generation	$66,137	$44,460	$70,962	$44,810	93.2%	99.2%

Source: Statistics Canada – 2006 Census. Catalogue Number 97-563-XCB2006060

11.3 Theories of Race and Ethnicity

Theoretical Perspectives

Issues of race and ethnicity can be observed through three major sociological perspectives: functionalism, conflict theory, and symbolic interactionism. As you read through these theories, ask yourself which one makes the most sense, and why. Is more than one theory needed to explain racism, prejudice, stereotypes, and discrimination?

Functionalism

In the view of functionalism, racial and ethnic inequalities must have served an important function in order to exist as long as they have. This concept, of course, is problematic. How can racism and discrimination contribute positively to society? Sociologists who adhere to the functionalist view argue that racism and discrimination *do* contribute positively, but only to the dominant group. Historically, it has indeed served dominant groups well to discriminate against subordinate groups. Slavery, of course, was beneficial to slaveholders. Holding racist views can benefit those who want to deny rights and privileges to people they view as inferior to them, but over time, racism harms society. Outcomes of race-based disenfranchisement — such as poverty levels, crime rates, and discrepancies in employment and education opportunities — illustrate the long-term (and clearly negative) results of slavery and racism in Canadian society.

Apart from the issues of race, ethnicity, and social inequality, the close ties of ethnic and racial membership can be seen to serve some positive functions even if they lead to the formation of ethnic and racial enclaves or ghettos. The close ties promote group cohesion, which can have economic benefits especially for immigrants who can use community contacts to pursue employment. They can also have political benefits in the form of political mobilization for recognition, services, or resources by different communities. The Truth and Reconciliation Commission for Aboriginal residential school survivors or the policy of multiculturalism are examples. Finally, the close ties of racial or ethnic groups also provide cultural familiarity and emotional support for individuals who might otherwise feel alienated by or discriminated against by the dominant society.

Critical Sociology

Critical sociological theories are often applied to inequalities of gender, social class, education, race, and ethnicity. A critical sociology perspective of Canadian history would examine the numerous past and current struggles between the Anglo-Saxon ruling class and racial and ethnic minorities, noting specific conflicts that have arisen when the dominant group perceived a threat from the minority group. Modern Canada itself can in fact be described as a product of **internal colonialism**. While Canada was originally a colony itself, the product of external colonialism, first by the French and then the English, it also adopted colonial techniques internally as it became an independent nation state. Internal colonialism refers to the process of uneven regional development by which a dominant group establishes its control over existing populations within a country. Typically it works by maintaining segregation among the colonized, which enables different

geographical distributions of people, different wage levels, and different occupational concentrations to form based on race or ethnicity.

For critical sociology, addressing the issues that arise when race and ethnicity become the basis of social inequality is a central focus of any emancipatory project. They are often complex problems, however. Feminist sociologist Patricia Hill Collins (b. 1948) developed **intersection theory**, which suggests we cannot separate the effects of race, class, gender, sexual orientation, and other attributes (1990). When we examine race and how it can bring us both advantages and disadvantages, it is important to acknowledge that the way we experience race is shaped, for example, by our gender and class. Multiple layers of disadvantage intersect to create the way we experience race. For example, if we want to understand prejudice, we must understand that the prejudice focused on a white woman because of her gender is very different from the layered prejudice focused on a poor Asian woman, who is affected by stereotypes related to being poor, being a woman, and being part of a visible minority.

Symbolic Interactionism

For symbolic interactionists, race and ethnicity provide strong symbols as sources of identity. In fact, some interactionists propose that the symbols of race, not race itself, are what lead to racism. Famed interactionist Herbert Blumer (1900–1987) suggested that racial prejudice is formed through interactions between members of the dominant group: without these interactions, individuals in the dominant group would not hold racist views. These interactions contribute to an abstract picture of the subordinate group that allows the dominant group to support its view of the subordinate group, thus maintaining the status quo. An example of this might be an individual whose beliefs about a particular group are based on images conveyed in popular media. These beliefs are unquestioned because the individual has never personally met a member of that group.

A **culture of prejudice** refers to the idea that prejudice is embedded in our culture. We grow up surrounded by images of stereotypes and casual expressions of racism and prejudice. Consider the casually racist imagery on grocery store shelves or the stereotypes that fill popular movies and advertisements. It is easy to see how someone living in Canada, who may know no Mexican Americans personally, might gain a stereotyped impression from such sources as the Speedy Gonzales cartoon character, Taco Time fast-food restaurants, or Hollywood movies. Because we are all exposed to these images and thoughts, it is impossible to know to what extent they have influenced our thought processes.

11.4. Intergroup Relations and the Management of Diversity

Throughout Western history intergroup relations (relationships between different groups of people) have been subject to different strategies for the management of diversity. The problem of management arises when differences between different peoples are regarded as so insurmountable that it is believed they cannot easily coincide or cohabit with one another. A **strategy for the management of diversity** refers to the systematic methods used to resolve conflicts, or potential conflicts, between groups that arise based on perceived differences. How can the unity of the self-group or political community be attained in the face of the divisive presence of non-selves or *others*? As Richard Day (b. 1964) describes it, the template for the problem of diversity was laid down at least as early as the works of the ancient Greeks Herodotus, Plato, and Aristotle: "the division of human individuals into groupable 'types,' the arrangement of these types into a hierarchy, the naming of some types as presenting a 'problem,' and the attempt to provide 'solutions' to the problem so constructed" (2000, p. 7). The solutions proposed to intergroup relations have ranged along a spectrum between tolerance and intolerance. The most tolerant form of intergroup relations is multiculturalism, in which cultural distinctions are made between groups, but the groups are regarded to have equal standing in society. At the other end of the continuum are assimilation, expulsion, and even genocide — stark examples of intolerant intergroup relations.

Genocide

Genocide, the deliberate annihilation of a targeted (usually subordinate) group, is the most toxic intergroup relationship. Historically, we can see that genocide has included both the intent to exterminate a group and the function of exterminating of a group, intentional or not.

Possibly the most well-known case of genocide is Hitler's attempt to exterminate the Jewish people in the first part of the 20th century. Also known as the Holocaust, the explicit goal of Hitler's "Final Solution" was the eradication of European

Jewry, as well as the decimation of other minority groups such as Catholics, people with disabilities, and homosexuals. With forced emigration, concentration camps, and mass executions in gas chambers, Hitler's Nazi regime was responsible for the deaths of 12 million people, 6 million of whom were Jewish. Hitler's intent was clear, and the high Jewish death toll certainly indicates that Hitler and his regime committed genocide. But how do we understand genocide that is not so overt and deliberate?



Figure 11.6. Portrait of Demasduit in 1819, a Beothuk woman captured and renamed "Mary March" by her captors. Demasduit died of tuberculosis in 1820. (Photo courtesy of Wikimedia Commons)

During the European colonization of North America, some historians estimate that Aboriginal populations dwindled from approximately 12 million people in the year 1500 to barely 237,000 by the year 1900 (Lewy, 2004). European settlers coerced Aboriginal people off their own lands, often causing thousands of deaths in forced removals, such as occurred in the Cherokee or Potawatomi Trail of Tears in the United States. Settlers also enslaved Aboriginal people and forced them to give up their religious and cultural practices. But the major cause of Aboriginal death was neither slavery nor war nor forced removal: it was the introduction of European diseases and Aboriginal people's lack of immunity to them. Smallpox, diphtheria, and measles flourished among North American Aboriginal peoples, who had no exposure to the diseases and no ability to fight them. Quite simply, these diseases decimated them. How planned this genocide was remains a topic of contention. Some argue that the spread of disease was an unintended effect of conquest, while others believe it was intentional with rumours of smallpox-infected blankets being distributed as "gifts" to Aboriginal communities.

Importantly, genocide is not a just a historical concept, but one practised today. Recently, ethnic and geographic conflicts in the Darfur region of Sudan have led to hundreds of thousands of deaths. As part of an ongoing land conflict, the Sudanese government and their state-sponsored Janjaweed militia have led a campaign of killing, forced displacement, and systematic rape of Darfuri people. A treaty was signed in 2011.

Expulsion

Expulsion refers to a dominant group forcing a subordinate group to leave a certain area or country. As seen in the examples of the Beothuk and the Holocaust, expulsion can be a factor in genocide. However, it can also stand on its

own as a destructive group interaction. Expulsion has often occurred historically with an ethnic or racial basis. The Great Expulsion of the French-speaking Acadians from Nova Scotia by the British beginning in 1755 is perhaps the most notorious case of the use of expulsion to manage the problem of diversity in Canada. The British conquest of Acadia (which included contemporary Nova Scotia and parts of New Brunswick, Quebec, and Maine) in 1710 created the problem of what to do with the French colonists who had been living there for 80 years. In the end, approximately three-quarters of the Acadian population were rounded up by British soldiers and loaded onto boats without regard for keeping families together. Many of them ended up in Spanish Louisiana where they formed the basis of contemporary Cajun culture.

On the West Coast, the War Measures Act was used in 1942 after the Japanese government's attack on Pearl Harbor to designate Japanese Canadians as enemy aliens and intern them in camps in the Slocan Valley in British Columbia, in southern Alberta, and elsewhere in Canada. Their property and possessions were sold to pay for their forced removal and internment. Over 22,000 Japanese Canadians (14,000 of whom were born in Canada) were held in these camps between 1941 and 1949, despite the fact that the RCMP and the Department of National Defence reported there was no evidence of collusion or espionage. In fact, many Japanese Canadians demonstrated their loyalty to Canada by serving in the Canadian military during the war. This was the largest mass movement of people in Canadian history. At the end of World War II, Japanese Canadians were obliged to settle east of the Rocky Mountains or face deportation to Japan. This ban only ended after 1949, four years after the war's end. In 1988, Prime Minister Brian Mulroney issued a formal apology for this expulsion, and compensation of $21,000 was paid to each surviving internee.

Segregation

Segregation refers to the physical separation of two groups, particularly in residence, but also in workplace and social functions. It is important to distinguish between *de jure* segregation (segregation that is enforced by law) and *de facto* segregation (segregation that occurs without laws but because of other factors). A stark example of *de jure* segregation is the apartheid movement of South Africa, which existed from 1948 to 1994. Under apartheid, black South Africans were stripped of their civil rights and forcibly relocated to areas that segregated them physically from their white compatriots. Only after decades of degradation, violent uprisings, and international advocacy was apartheid finally abolished.

De jure segregation occurred in the United States for many years after the Civil War. During this time, many former Confederate states passed "Jim Crow" laws that required segregated facilities for blacks and whites. These laws were codified in 1896's landmark Supreme Court case *Plessey v. Ferguson*, which stated that "separate but equal" facilities were constitutional. For the next five decades, blacks were subjected to legalized discrimination, forced to live, work, and go to school in separate — but *unequal* — facilities. It wasn't until 1954 and the *Brown v. Board of Education* case that the Supreme Court declared that "separate educational facilities are inherently unequal," thus ending *de jure* segregation in the United States.

De jure segregation was also a factor in Canada's development. Although slavery ended in Canada in 1834, when Britain abolished slavery throughout the empire, the approximately 60,000 blacks who arrived with the British Empire Loyalists following the American Revolution and through the "Underground Railroad" up until the end of the American Civil War, were subject to discrimination and differential treatment. Legislation in Ontario and Nova Scotia created racially segregated schools, while *de facto* segregation of blacks was practised in the workplace, restaurants, hotels, theatres, and swimming pools. Similarly, segregating laws were passed in British Columbia, Saskatchewan, and Ontario preventing Chinese- and Japanese-owned restaurants and laundries from hiring white women out of concern that the women would be corrupted (Mosher, 1998). The reserve system created through the treaty process with First Nations peoples can also be regarded as a form of *de jure* segregation. As was the case in the United States, *de jure* segregation (with the exception of the reserve system) was largely eliminated in Canada by the 1950s and 1960s.

De facto segregation, however, cannot be abolished by any court mandate. Segregation has existed throughout Canada, with different racial or ethnic groups often segregated by neighbourhood, borough, or parish. Various Chinatowns or Japantowns developed in Canadian cities in the 19th and 20th centuries. The community of Africville was a residentially and socially segregated black enclave in Halifax established by escaped American slaves. As noted at the beginning of the chapter, some urban neighbourhoods like Richmond, Surrey, and Markham are home to high concentrations of Chinese and South Asians.



Figure 11.7. In the "Jim Crow" South, it was legal to have "separate but equal" facilities for blacks and whites. (Photo courtesy of Library of Congress/Wikimedia Commons)

Sociologists use segregation indices to measure racial segregation of different races in different areas. The indices employ a scale from 0 to 100, where 0 is the most integrated and 100 is the least. In Vancouver, Toronto, and Montreal, these indices were relatively high (2001 data) for visible minorities as a whole — over 40 — and higher for Chinese and South Asians — over 50 (Walks & Bourne, 2006). This means that 40% of either visible minorities or whites, 50% of Chinese and South Asians or whites, would have to move in order for each neighbourhood to have the same racial balance as the whole metro region. However, these indices are much lower than those observed in the United States for black populations. In the New York metropolitan area, for instance, the black-white segregation index was 79 for the years 2005–2009. This means that 79% of either blacks or whites would have to move in order for each neighbourhood to have the same racial balance as the whole metro region (Population Studies Center, 2010).

Assimilation

Assimilation describes the process by which a minority individual or group gives up its own identity by taking on the characteristics of the dominant culture. In Canada, assimilation was the policy adopted by the government with the Indian Act, which attempted to integrate the Aboriginal population by Europeanizing them. Assimilation was also the policy for absorbing immigrants from different lands through the function of immigration.

Canada is a settler nation. With the exception of Aboriginal Canadians, all Canadians have immigrant ancestors. In the 20th century, there were three waves of immigration to Canada (Li, 1996). During the wheat boom from 1900 to the beginning of World War I, Canada recruited almost 3 million settlers from various parts of Europe, although many subsequently emigrated to the United States. For the two decades following World War II, another 3 million immigrants arrived (96% from Europe between 1946 and 1954, and 83% from Europe between 1954 and 1967). As we saw at the beginning of the chapter, the third wave of immigration following the change of the race-based immigration policy saw increasingly larger proportions of immigrants from non-European countries. Most immigrants are eventually absorbed into Canadian culture, although sometimes after facing extended periods of prejudice and discrimination. Assimilation means the loss of the minority group's cultural identity as ithe people in that group become absorbed into the dominant culture, while there is minimal to no impact on the majority group's cultural identity.

Some assimilated groups may keep only symbolic gestures of their original ethnicity. For instance, many Irish Canadians may celebrate Saint Patrick's Day, many Hindu Canadians enjoy the Diwali festival, and many Chinese Canadians may celebrate Chinese New Year. However, for the rest of the year, other aspects of their originating culture may be forgotten.

Assimilation is antithetical to the "cultural mosaic" model understood by Canadian multiculturalism; rather than maintaining their own cultural flavour, subordinate cultures give up their own traditions in order to conform to their



Figure 11.8. Government advertisement in 1907 to encourage immigration and settlement of the western provinces. (Photo courtesy of Wikimedia Commons)

new environment. Cultural differences are erased. It is sometimes understood as the American "melting pot" model, although ideally the "melting pot" sees the combination of cultures resulting in a new culture entirely. Sociologists measure the degree to which immigrants have assimilated to a new culture with four benchmarks: socioeconomic status, spatial concentration, language assimilation, and intermarriage. When faced with racial and ethnic discrimination, it can be difficult for new immigrants to fully assimilate. Language assimilation, in particular, can be a formidable barrier, limiting employment and educational options and therefore constraining growth in socioeconomic status.

Multiculturalism

In the government document, *Multiculturalism: Being Canadian,* **multiculturalism** is defined as "the recognition of the cultural and racial diversity of Canada and of the equality of Canadians of all origins" (as cited in Day, 2000, p. 6). It is represented in Canada by the metaphor of the mosaic, which suggests that in a multicultural society each ethnic or racial group preserves its unique cultural traits while together contributing to national unity. Each culture is equally important within the mosaic. There is a great mixture of different cultures where each culture retains its own identity and yet adds to the colour of the whole. The ideal of multiculturalism is characterized by mutual respect on the part of all cultures, both dominant and subordinate, creating a polyethnic environment of mutual tolerance and acceptance.

As a strategy for managing diversity, Canada was the first country to adopt an official multicultural policy. In 1971, Prime Minister Pierre Trudeau implemented both a policy of official bilingualism (both French and English would be



Figure 11.9. The Monument to Multiculturalism (1985) by Francesco Pirelli, in front of Union Station, Toronto (Courtesy of Wikimedia Commons)

the languages of the state) and a policy of multiculturalism. The multicultural policy was designed to assist the different cultural groups in Canada to preserve their heritage, overcome cultural barriers to participation in Canadian society, and exchange with other cultural groups in order to contribute to national unity (Ujimoto, 2000). Critics argue that Trudeau's motives were more oriented to undermining the Québécois separatist movement and winning the votes of urban ethnic communities than distributing more power to ethnic communities (Li, 1996). However, as a result of this policy initiative, multiculturalism was enshrined in the Canadian Constitution in 1982 and in the Multiculturalism Act of 1988 as a fundamental principle of Canadian society. The result is a mechanism, stated in the Canadian Charter of Rights and Freedoms, that obliges Canadian law and federal institutions to operate "in a manner consistent with the preservation and enhancement of the multicultural heritage of Canadians" (as cited in Li, 1996, p. 132).

Whereas constitutional democracies like Canada are typically based on the protection of individual rights, multiculturalism implies that the protection of cultural difference also depends on protecting **group-specific rights** or group-differentiated rights (i.e., rights conferred on individuals by virtue of their membership in a group). Kymlicka notes that there are three different ways that the principle of multicultural group-specific rights can be conceived: (1) as *self-government rights* in which culturally distinct nations within a society attain some degree of political autonomy and self-determination to ensure their survival and development as unique peoples; (2) as *polyethnic rights* in which culturally distinct groups are able to express their particular cultural beliefs and practices without being discriminated against, and (3) as *special representation rights* in which the systematic underrepresentation of minorities in the political process is addressed by some form of proportional representation (e.g., reserving a certain number of parliamentary seats for specific ethnic minorities or language groups) (1995). While multicultural policy in Canada has generally been implemented on the basis of polyethnic rights, self-government rights have been a key part of First Nations' claims and special representation rights have also occasionally been proposed, as was the case during the Charlottetown Accord debate in 1992.

While the outcome of Canadian multicultural policy has been the establishment of a generally accepted norm in which no culture takes precedence over any other in Canadian society, at least not in official practice, and all Canadians are recognized as "full and equal participants in Canadian society" (as stated in the Canadian Multiculturalism Act of 1988), there have been a number of flashpoints in which the viability of the policy has been called into question. The case of whether Sikhs in the RCMP should be allowed to wear *dastaar* while in uniform was an early example. Although it seems trivial today, in 1990 many felt that the right of Sikhs to maintain their religious practice undermined a core and inviolable tradition of both the police force and Canada. As such, the case served as an emblem of a deeper fear about multiculturalism, namely that it would foster a dangerous fragmentation of an already fragile Canadian unity. In particular,

new non-European immigrants were seen by some as too different and their demands for accommodation too disruptive to "Canadian" values and practices to sustain. Of course, similar claims about the unassimilable differences of immigrants from Ireland, eastern Europe, and southern Europe were made in earlier waves of immigration. More recently a similar issue played out with respect to the Parti Québécois' Quebec Charter of Values, which sought to secularize government institutions by removing visible symbols of religious practice like the Sikh *dastaar*, Muslim *hijab*, or Jewish *kippah* from public service.

While the positive outcome of the multicultural policy is that the Canadian population remains remarkably accepting of diversity — the most accepting of all OECD countries in 2011 according to the Gallup World Poll (Conference Board of Canada, 2013) — issues around multiculturalism continually bring up the problem of **ethical relativism**, the idea that all cultures and all cultural practices have equal value. In a fully multicultural society, what principles can be appealed to in order to resolve issues where different cultural beliefs or practices clash? Richard Day has argued that rather than resolving the problem of diversity, official multiculturalism has exacerbated it. "Far from achieving its goal, this state sponsored attempt to design a unified nation has paradoxically led to an increase in both the number of minority identities and in the amount of effort required to 'manage' them" (2000, p.3).

Hybridity

Hybridity is the process by which different racial and ethnic groups combine to create new or emergent cultural forms of life. Rather than a multicultural mosaic, where each culture preserves its unique traditions, or a melting pot, where cultures assimilate into the majority group, the hybrid combination of cultures results in a new culture entirely. The post-colonialist theorist Homi Bhabha (b. 1949) suggested that the mingling of formerly fixed cultural identities "open[s] up the possibility of a cultural hybridity that entertains difference without an assumed or imposed hierarchy" (1994, p. 4). The contemporary cultures of the Caribbean, for example, is a mixture of European colonization, African roots, and "New World" setting that defies the imposition of a single cultural identity. Those things that are regarded as essentially Caribbean like the accents, racial blendings, religious beliefs, spicy cuisines, and music have thoroughly diverse origins while being continuously reinvented (Hall, 1990).

As we noted earlier in this chapter, intermarriage between people of different races or cultures creates new hybrid identities. The Métis were Canada's original hybrid culture (Day, 2000). More recently, Canadian culture has been home to numerous emergent cultural forms, some superficial and some profound, due to the intermingling of people from diverse backgrounds. From fusion cuisine to martial arts and yoga, from hip hop to reggae, and including alternative spiritual and healing practices hybridity seems to capture some of the fluidity of contemporary Canadian culture. As the category of multiple ethnic origins by which people identify themselves grows, it is possible that the distinctions between ethnicities or between races that supported the "us versus them" narratives of earlier forms of racism and ethnocentrism might disappear all by themselves (Day, 2000).

11.5. Race and Ethnicity in Canada

When colonists came to the New World, they found a land that did not need "discovering" since it was already occupied. While the first wave of immigrants came from western Europe, eventually the bulk of people entering North America were from northern Europe, then eastern Europe, then Latin America and Asia. And let us not forget the forced immigration of African slaves. Most of these groups underwent a period of disenfranchisement in which they were relegated to the bottom of the social hierarchy before they managed (those who could) to achieve social mobility. Today, our society is multicultural, although the extent to which this multiculturality is embraced varies, and the many manifestations of multiculturalism carry significant political repercussions. The sections below describe how several groups became part of Canadian society, discuss the history of intergroup relations for each group, and assess each group's status today.

Aboriginal Canadians

The only non-immigrant ethnic group in Canada, Aboriginal Canadians were once a large population, but by 2011 they made up only 4.3% of the Canadian populace (Statistics Canada, 2013).

Making Connections: Social Policy and Debate

Sports Teams with Indigenous Names



Figure 11.10. Many people believe sports teams with names like the Eskimos, Indians, Braves, and Warriors perpetuate unwelcome stereotypes of Aboriginal peoples. (Photo (left) courtesy of born1945/Flickr; Photo (right) courtesy of Daniel Paquet/Flickr)

The sports world abounds with team names like the Eskimos, Indians, Warriors, Braves, and even Savages and Redskins. These names arise from historically prejudiced views of Aboriginal people as fierce, brave, and strong savages: attributes that would be beneficial to a sports team, but are not necessarily beneficial to North Americans who should be seen as more than just fierce savages.

Speaking with regard to the Edmonton Eskimos football team, Natan Obed of Inuit Tapiriit Kanatami (the national Inuit organization) argues that the term "Eskimo" is derogatory and represents a legacy of colonialism and disrespect." If I was called an Eskimo or introduced as an Eskimo by anyone else, I would be offended by that…. It is something that was acceptable at one time but now just isn't…. It's time for the team to change its name. And it's time also for all sports teams to change their names if they continue to use Indigenous people as their mascots" (CBC, 2015).

Since the civil rights movement of the 1960s, the National Congress of American Indians (NCAI) has been campaigning against the use of such mascots, asserting that the "warrior savage myth … reinforces the racist view that Indians are uncivilized and uneducated and it has been used to justify policies of forced assimilation and destruction of Indian culture" (NCAI Resolution #TUL-05-087, 2005). The campaign has met with only limited success. While some teams have changed their names, hundreds of professional, college, and K–12 school teams still have names derived from this stereotype. Another group, American Indian Cultural Support (AICS) is especially concerned with such names at K–12 schools, grades where children should be gaining a fuller and more realistic understanding of Aboriginal people than such stereotypes supply (2005).

What do you think about such names? Should they be allowed or banned? What argument would a symbolic interactionist make on this topic?

How and Why They Came

The earliest humans in Canada arrived millennia before European immigrants. Dates of the migration are debated with estimates ranging from between 45,000 and 12,000 BCE. It is thought that people migrated to this new land from Asia in search of big game to hunt, which they found in huge herds of grazing herbivores in the Americas. Over the centuries and then the millennia, Aboriginal cultures blossomed into an intricate web of hundreds of interconnected groups, each with its own customs, traditions, languages, and religions.

History of Intergroup Relations

Aboriginal cultures prior to European settlement are referred to as pre-contact or pre-Columbian: that is, prior to the coming of Christopher Columbus in 1492. Mistakenly believing that he had landed in the East Indies, Columbus named



Figure 11.11. Elders and Aboriginal soldiers in the uniform of the Canadian Expeditionary Force in World War I. Seated in the middle is W. M. Graham, an ambitious official in the Department of Indian Affairs, whose career was focused on preventing Canadian Indians from "regressing" to their old, traditions. To his mind ceremonial dancing was an unmitigated evil that only "demoralized the Indians" (Titley, 1983). (Photo courtesy of Library and Archives Canada/Wikimedia Commons).

the Indigenous people "Indians:" a name that has persisted for centuries despite it being a geographical misnomer used to homogenously label over 500 distinct groups who have their own languages and traditions.

The history of intergroup relations between European colonists and Aboriginal peoples is a brutal one that most Canadians are familiar with. As discussed in the section on genocide, the effect of European settlement was to nearly destroy the Aboriginal population. And although Aboriginal people's lack of immunity to European diseases caused the most deaths, overt mistreatment by Europeans was equally devastating.

The history of Aboriginal relations with Europeans in Canada since the 16th century can be described in four stages (Patterson, 1972). In the first stage, the relationship was largely mutually beneficial and profitable as the Europeans relied on Aboriginal groups for knowledge, food, and supplies, whereas the Aboriginals traded for European technologies. In the second stage, however, Aboriginal people were increasingly drawn into the European-centred economy, coming to rely on fur trading for their livelihood rather than their own indigenous economic activity. This resulted in diminishing autonomy and increasing subjugation economically, militarily, politically, and religiously. In the third stage, the reserve system was established, clearing the way for full-scale European colonization, resource exploitation, agriculture, and settlement. If Aboriginal people tried to retain their stewardship of the land, Europeans fought them off with superior weapons. A key element of this issue is the Aboriginal view of land and land ownership. Most First Nations cultures considered the Earth a living entity whose resources they were stewards of; the concepts of land ownership and conquest did not exist in Aboriginal societies. The last stage of the relationship developed after World War II, when Aboriginal Canadians began to mobilize politically to challenge the conditions of oppression and forced assimilation they had been subjected to. In this stage, Aboriginal people developed political organizations and turned to the courts to fight for treaty rights and self-government.

A key turning point in Aboriginal-European relations was the Royal Proclamation of 1763 which established British rule over the former French colonies, but also established that lands would be set aside for First Nations people. It legally established that First Nations had sovereign rights to their territory. Although these were often disputed, challenged, or ignored by the arriving waves of colonists, land speculators, and subsequent government administrations, they became the basis of contemporary treaty rights and negotiations.

The Indian Act of 1876 was another turning point. The Act attempted to codify and formalize the provisions of the Royal Proclamation and all other accumulated acts of government with respect to First Nations along the lines of

a paternalistic "civilizing policy." The care of the Aboriginal population was placed under the control of the federal government until they were assimilated into European culture. In effect, discrimination against Aboriginal Canadians was institutionalized in a series of provisions intended to subjugate them and keep them from gaining any power. The belief was that a separate act to govern Aboriginal peoples would no longer be necessary once they had integrated into society. As the deputy superintendent of Indian Affairs said in 1920, "Our objective is to continue until there is not a single Indian in Canada that has not been absorbed into the body politic and there is no Indian question, and no Indian Department" (as cited in Leslie, 1978, p. 114). Nevertheless the Indian Act became the most pervasive mechanism in Aboriginal life, regulating and controlling everything from who could be defined as an Indian, to the reserve and band council system, to the types of Aboriginal activities that would no longer be permitted (e.g., *potlatch* and ceremonial dancing).

Some of the most impactful provisions of the Indian Act (and its subsequent amendments) were:

- The prohibition against owning, acquiring, or "pre-empting" land
- The dismantling of traditional institutions of Aboriginal government and the banning of ceremonial practices
- The imposition of the band council system, which was foreign to Aboriginal tradition and powerless to make meaningful decisions without approval of the Department of Indian Affairs
- Denial of the power to allocate funds and resources
- The prohibition against hiring lawyers or seeking legal redress in pursuing land claims
- The denial of the right to vote municipally (until 1948), provincially (until 1949), and federally (until 1960) (Mathias & Yabsley, 1991)

Aboriginal Canadian culture was further eroded by the establishment of residential schools in the late 19th century, as we saw earlier in this chapter. These schools, run by both Christian missionaries and the Canadian government, also had the express purpose of "civilizing" Aboriginal Canadian children and assimilating them into European society. The residential schools were located off-reserve to ensure that children were separated from their families and culture. Schools forced children to cut their hair, speak English or French, and practise Christianity. Education in the schools was substandard, and physical and sexual abuses were rampant for decades; only in 1996 did the last of the residential schools close. Prime Minister Stephen Harper delivered an apology on behalf of the Canadian government in 2008. Many of the problems that Indigenous Canadians face today result from almost a century of traumatizing mistreatment at these residential schools.

Current Status

The eradication of Aboriginal Canadian culture continued until the 1960s, when First Nations began to mobilize politically and intensify their demands for Aboriginal rights. The Liberal government's White Paper of 1969 became a focus of Aboriginal protest as it proposed to eliminate the Indian Act, the Department of Indian Affairs, and the concept of Aboriginal rights altogether. First Nations people would be treated just like everyone else, as if the sovereign treaties and centuries of oppression had not occurred. Prime Minister Pierre Trudeau declared, "No society can be built on historical might-have-beens" (as cited in Weaver, 1981, p. 55). By the time of the repatriation of the Constitution in 1982, the government's position had reversed and the status of Indians, Inuit, and Métis were recognized, as were existing Aboriginal and treaty rights. The 1996 Nisga'a Treaty of the Nisga'a people of the Nass Valley in northern British Columbia is the first modern treaty in British Columbia. The comprehensive treaty provisions for the Nisga'a's right to self-government and authority over lands and resources serve as a new model for First Nations–Crown relations in Canada.

However, First Nations people still suffer the effects of centuries of degradation. As noted earlier in the chapter, the income of Aboriginal people in Canada is far lower than that of non-Aboriginal people and rates of child poverty are much greater. Even though the last residential school closed in 1996, the problem of Aboriginal education remains grave with 40% of all Aboriginal people failing to complete high school. Long-term poverty, inadequate education, cultural dislocation, and high rates of unemployment contribute to Aboriginal Canadian populations falling to the bottom of the economic spectrum. Aboriginal Canadians also suffer disproportionately with lower life expectancies than most groups in Canada.

The Québécois

Modern Canada was founded on the displacement of the Aboriginal population by two colonizing nations: the French and

the British. The French and the British were the two "charter groups" of Confederation and the British North America Act. The Constitution Act of 1867 protected the linguistic, religious, and educational of the French and English in Quebec and Ontario, as well as the rest of the country. However, the French were both colonized by the English and were a numerically smaller group, leading to a relationship of inequality that has been a prominent issue throughout Canada's history. Due to their linguistic and cultural isolation in English speaking North America, the Québécois — descendants of the original settlers from France — developed a unique identity, which became the basis of nationalist and sovereigntist aspirations during the Quiet Revolution of the 1960s.

How and Why They Came

French colonists began to settle New France after Jacques Cartier's exploration of the St. Lawrence River in 1534. Permanent French settlements were established in Port Royal, Acadia (now Nova Scotia) in 1605, and Quebec City in 1608. By the time of the British conquest of Acadia in 1710 and the defeat of Montcalm's army in Quebec in 1760, there were approximately 60,000 French settlers. Most of the settlers could trace their origins to the northwest of France, particularly present-day Normandy. One estimate suggests that the Québécois descend from only 5,800 original immigrants from France who arrived between 1608 and 1760 (Marquis, 1923). The economy of New France was based on agriculture and the fur trade, but with the arrival of the British and especially the British Loyalists escaping the American Revolution in 1776, a pattern of British economic and financial domination emerged.

History of Intergroup Relations

The establishment of British rule in Canada was accomplished by **conquest**; that is, the forcible subjugation of territory and people by military action. Port Royal was ceded to the British in the Treaty of Utrecht of 1713 and Quebec and Montreal in the Treaty of Paris of 1763. As we noted earlier, after attempts at assimilating the French population, the conquest of Port Royal and Acadia led eventually to the Great Expulsion of 1755, in which a large portion of the Acadian French population was deported from Nova Scotia. However, from the time of the Treaty of Paris onward, the British recognized the need to accommodate the French in Canada to avoid the problem of pacifying a large and hostile population. The Quebec Act of 1774 granted religious and linguistic rights to the French, and the Constitution Act of 1791 divided the province of Canada into Upper and Lower Canada, each with the power of self-government. The division of Canada into two founding charter groups — French and English — was further established by Confederation. The Constitution Act of 1867 protected the religious, educational, and linguistic rights of the French and English in Canada. In addition, civil law in Quebec continued to be based on the French Napoleonic Code of 1804: the Civil Code of Lower Canada (1866).

Despite the notion of equality behind the two-founding-nations theme of Canadian Confederation, English-speaking Canadians in Montreal held the positions of power in the economy. English was the language of commerce in Quebec. The French-speaking population in Quebec were largely rural, agricultural, and dominated by the Catholic Church until the mid-20th century. Although the Québécois achieved status as a new middle class of lawyers, doctors, administrators, politicians, scientists, and intellectuals, they were effectively barred from the upper echelons of the stratified system. English and French tended to live in what Canadian author Hugh MacLennan famously called "two solitudes." This ethnic stratification system began to be challenged during the period of the Quiet Revolution in Quebec in the 1960s when the control of the Catholic Church was challenged in the spheres of education, health, and welfare, and the long-standing reactionary Union Nationale government of Maurice Duplessis was defeated by Jean Lesage's Liberals. In the process of modernizing the state to address the new conditions of industrialization, urbanization, and continental capitalism, the Quebec independence movement emerged alongside an increasingly militant labour movement.

To address the emerging crisis of Canadian unity, the federal government appointed the Royal Commission on Bilingualism and Biculturalism in 1963. True to its name, the commission tried to address the grievances of the Québécois solely as cultural and linguistic matters. The report of the commission emphasized ways in which the equality of the two founding peoples could be recognized and led to the Official Languages Act of 1969. The Act recognized French and English as the two official languages in Canada and mandated that federal government services and the judicial system would be conducted in both languages. However, when a small terrorist group — the Front de Libération du Québec (FLQ) — kidnapped a provincial government minister and a British diplomat in 1970, the response of the federal government was to implement the War Measures Act, suspending the rights of Canadians from coast to coast and arresting

and detaining hundreds of individuals without legal due process. The notion of equal partnership between French and English Canada was proven to be questionable at best.



Figure 11.12. St. Jean Baptiste Day, La Fête Nationale, celebrated in Quebec on June 24. (Photo courtesy of Wikimedia Commons).

In 1976, the Parti Québécois was elected as an explicitly separatist political party. It failed to get sufficient votes to separate in the provincial referendum on sovereignty in 1980, but the move to repatriate the constitution from Great Britain without the consent of Quebec in 1982 fuelled nationalist sentiment. Subsequent attempts to include Quebec as a voluntary signatory to the constitution failed in 1987 (the Meech Lake Accord) and 1992 (the Charlottetown Accord). Many people in Quebec regarded these failures as rejection of Quebec by the English majority in other parts of the country. In 1995 a second referendum on Quebec sovereignty was a narrowly defeated by a vote of 50.5% to 49.5%. The history of intergroup relations between the French and English in Canada on the model of equal partnership has therefore proven to be a tenuous experiment in dual nationhood.

Current Status

A major component of the grievances between the French and English in Canada has been the social inequality of the French and English and the threat to Québécois linguistic and cultural survival. Income data from 1991 indicated that the income disparity between French and English Canadians both within and outside the province of Quebec had more or less disappeared, suggesting that the issues of intergroup relations had shifted to political, linguistic, and cultural alienation in Canada (Li, 1996).

Bill 101 or the Charter of the French Language was passed in 1977 in Quebec to protect the French language in Quebec. It defines French as the official language of Quebec, limits the use of English in commercial signs, and restricts who may enroll in English schools. Although it remains controversial, it appears to have been somewhat effective in preserving the French language. Linguistically, there were 7 million people who reported speaking French *most often* at home in 2011 compared to 6.7 million in 2006, although this represented a decline from 21.4% to 21% of the total population of Canada. (This is much lower than the 28 to 30% of population who claimed French origin in the first half of the 20th century, however). In Quebec, 75.1% of the population spoke *only French* at home in 2006 compared to 72.8% in 2011. This decline was paralleled by the decline in the proportion of the population who spoke only English at home in the rest of Canada from 77.1% to 74.1% between 2006 and 2011 (due to immigration). On the other hand, the number of people reporting that they were able to conduct conversation in both French and English increased by 350,000 to 5.8 million people in 2011. Bilingualism was reported by 17.5% of the population, albeit largely in Quebec. In Quebec, 42.6% of people reported being able to conduct conversation in both English and French (Statistics Canada, 2012).

Black Canadians

As discussed in the section on race, the term "black Canadian" is usually preferred to the term African Canadian. Many people with dark skin in Canada have roots in the Caribbean rather than being descendants of the African slaves from the United States. They see themselves ethnically as Caribbean Canadians. Further, actual immigrants from Africa may feel that they have more of a claim to the term "African Canadian" than those who are many generations removed from ancestors who originally came to this country. The commonality of black Canadians is more a function of racism rather than origin.

How and Why They Came

The first black Canadians were slaves brought to Canada by the French in the 17th century. It is reported that at least 6 of the 16 legislators in English Upper Canada also owned slaves (Mosher, 1998). The economic conditions in Canada were not conducive to slavery so the practice was not widespread. Nevertheless, it was not until 1834 that slavery was banned throughout the British Empire, including Canada. Canada became the terminus of the famous Underground Railroad, a secret network organized by American abolitionists to transport escaped slaves to freedom. Between the American Revolution in 1776 and the end of the American Civil War in 1865, Canada received approximately 60,000 runaway slaves and black Empire Loyalists from the United States. It is estimated that 10% of the Empire Loyalists who came to Canada following the American Revolution were black (Walker, 1980). Many black Canadians returned to the United States after the Civil War, and by 1911 there were only about 17,000 left in Canada (Mosher, 1998).

After the change in immigration policy in the late 1960s, blacks from the Caribbean and elsewhere began to immigrate to Canada in increasing numbers. Prior to 1971, Canadians of black origin made up less than 1% of the population (Li, 1996). In the 2011 census, they made up 2.9% of the population and 15.1% of all visible minorities in the country; 42% of blacks lived in Toronto and 22.9% in Montreal (making them the largest visible minority group in Montreal) (Statistics Canada, 2013). Blacks with origins in the Caribbean make up the largest proportion of black Canadians with nearly 40% having Jamaican heritage and an additional 32% having heritage elsewhere in the Caribbean (Statistics Canada, 2007). Many Caribbean people come to Canada as part of the Canadian Seasonal Agricultural Workers Program or as domestic workers with temporary work permits, although the permanent Caribbean community in Canada has more or less the same higher education attainments and full-time employment rates as the rest of the population.

More recently, there has been an increase in immigration of Somalis from Africa as people fled conflict in the area. In the 2011 census, 4.4% of the black population in Canada claimed Somali origin (Statistics Canada, 2013). Between 1988 and 1996, more than 55,000 Somali refugees arrived in Canada, representing the largest black immigrant group ever to come to Canada in such a short time (Abdulle, 1999).

History of Intergroup Relations

Although slavery became in illegal in Canada in 1834, blacks did not effectively enjoy equal rights in Canada. Blacks had the same legal status as whites in Canada, but strongly held prejudices and informal practices of segregation lead to pervasive discrimination against the escaping slaves and black Empire Loyalists in the 19th century. Blacks could vote and sit on juries, but these rights were frequently challenged by white citizens. As noted earlier in this chapter, Ontario (outside of Toronto) and Nova Scotia enacted laws to segregate schools along racial lines that remained in effect until 1965 in Ontario and 1983 in Nova Scotia (Black History Canada, 2014).

Blacks were also segregated into residential neighbourhoods in Toronto, Hamilton, and Windsor (Mosher 1998). In Halifax, the community of Africville was set aside for blacks as early as 1749, although most accounts place its establishment to the arrival of black Loyalists after the War of 1812. It was considered a slum by city councillors and was bulldozed between 1965 and 1970 without meaningful consultation with its residents.

Blacks were also restricted by the type of occupations they could pursue. The employment of blacks through the first half of the 20th century was typically limited to being domestic workers or railroad porters. For example, the father of Oscar Peterson, the famous jazz pianist, was a Canadian Pacific railroad porter in Montreal, while his mother was employed as a domestic worker (Library and Archives Canada, 2001). Otherwise, for most of the 20th century, black Canadians were mostly employed in low-pay service jobs or as unskilled labour.

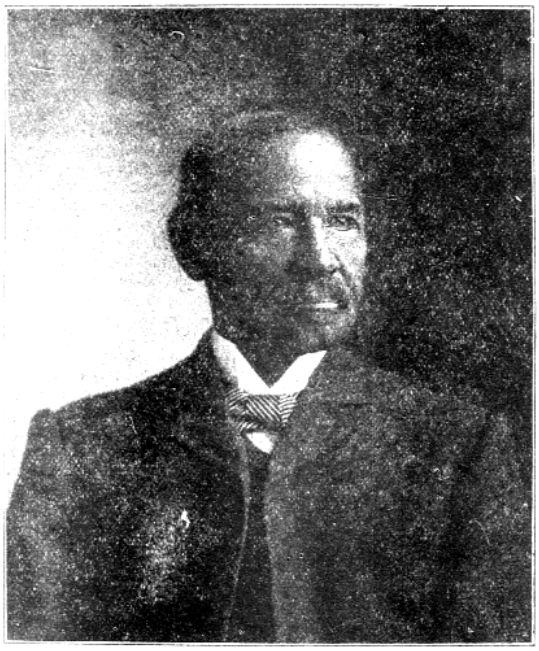


Figure 11.13. Mifflin Wistar Gibbs (Photo courtesy of Wikimedia Commons).

The story of a large group of black immigrants who arrived in Victoria, British Columbia, from San Francisco in the 1850s, illustrates some of the ambiguities of the early black experience in Canada. The blacks were initially welcomed to the British colony by Governor Douglas, who assured them they would have full civic rights. Douglas and others were worried that the immigration of white Americans to Vancouver Island might lead to annexation by the United States and the arrival of several hundred black immigrants would help to prevent that eventuality. There was also need for an industrious and reliable workforce and by 1858 the black immigrants were fully employed. In 1859, an all-black Victoria Pioneer Rifle Company was formed to fight in the "Pig War" dispute with the United States over the San Juan Islands. The de facto leader of the black immigrant group, Mifflin Gibbs (1823–1915), was a successful shopkeeper and prominent member of the community. He won a seat on city council in the wealthiest ward of the city, James Bay, and acted as temporary mayor for a time. He was also the Salt Spring Island representative to the Yale Convention where British Columbia's terms for joining Confederation were drawn up.

On the other hand, tensions and discrimination began to develop between the black and white communities. Schools were integrated and only one church was segregated. However a dispute over black voting led to a racist campaign by future premier Amor de Cosmos. Blacks began to be denied access to some saloons and desired seating in theatres. An incident in 1860 involving a brawl that began when two blacks were denied their legitimate entry into Victoria's Colonial Theatre generated newspaper accounts that blamed the blacks for causing trouble. As influential as Gibbs was, he was denied tickets to the retirement banquet of Governor Douglas, who had originally been a great supporter of the black immigrants. By the time Gibbs returned to the United States in 1870, the end of slavery after the U.S. Civil War had already led to many of the black community leaving Victoria. Without Gibbs's presence, the black community declined even further and eventually disappeared (Ruttan, 2014).

Current Status

Although formalized discrimination against black Canadians has been outlawed, in many respects true equality does not yet exist. The 2006 census shows that black Canadians earned 75.6 cents for every dollar a white worker earned in Canada, or $9,101 less per year. In 2006, 24% of black individuals in families and 54% of single black individuals lived in poverty (compared to 6.4% of individuals in white families and approximately 26% of single white individuals) (Block & Galabuzi,

2011). In addition blacks are subject to greater degrees of *racial profiling* than other groups. Racial profiling refers to the practice of selecting specific racial groups for greater levels of criminal justice surveillance. Despite police denials, Wortley and Tanner's study confirms black complaints in Toronto that they are more frequently stopped, questioned, and searched by the police for "driving while being black" violations than other groups (2004).

Asian Canadians



Figure 11.14. A Chinese head tax receipt for $500 issued on August 2, 1918. (Courtesy of Wikimedia Commons).

Like many groups this section discusses, Asian Canadians represent a great diversity of cultures and backgrounds. The national and ethnic diversity of Asian Canadian immigration history is reflected in the variety of their experiences in joining Canadian society. Asian immigrants have come to Canada in waves, at different times, and for different reasons. The experience of a Japanese Canadian whose family has been in Canada for five generations will be drastically different from a Laotian Canadian who has only been in Canada for a few years. This section primarily discusses the experience of Chinese, Japanese, and South Asian immigrants.

How and Why They Came

The first Asian immigrants to come to Canada in the mid-19th century were Chinese. These immigrants were primarily men whose intention was to work for several years in order to earn incomes to support their families in China. Their first destination was the Fraser Canyon for the gold rush in 1858. Many of these Chinese came north from California. The second major wave of Chinese immigration arrived for the construction of the Canadian Pacific Railway when contractors recruited thousands of workers from Taiwan and Guandong Province in China. Chinese labourers were paid approximately a third of what white, black, and Aboriginal workers were paid. Even so, they were used to complete the most difficult sections of track through the rugged Fraser Valley Canyon, living under squalid and dangerous conditions; 600 Chinese workers died during the construction of the rail line. Chinese men also engaged in other manual labour like mining, laundry, cooking, canning, and agricultural work. The work was gruelling and underpaid, but like many immigrants they persevered (Chan, 2013).

Japanese immigration began in 1887 with the arrival of the first Japanese settler, Manzo Nagano. The *Issei* (first wave of Japanese immigrants) were, like the first Chinese immigrants, mostly men. They came from fishing and farming backgrounds in the southern Japanese islands of Kyushu and Honshu. They settled in Japantowns in Victoria and Vancouver, as well as in the Fraser Valley and small towns along the Pacific coast where they worked mostly in fishing,

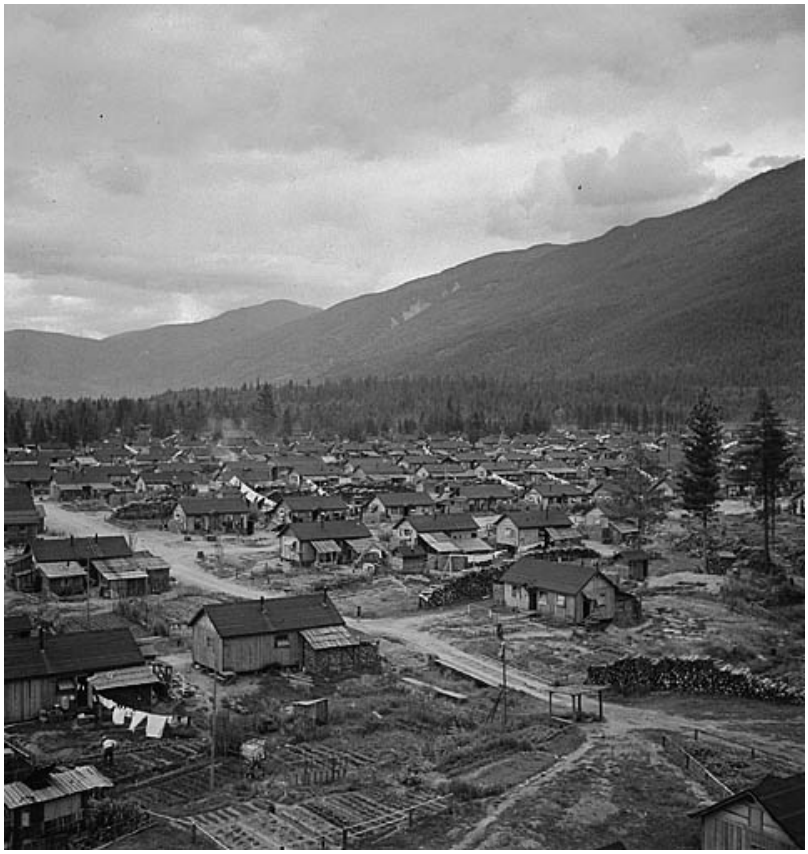


Figure 11.15. Japanese internment camp in British Columbia. (Photo courtesy of Wikimedia Commons/Jack Long)

farming, and logging. Like the Chinese settlers, they were paid much less than workers from European backgrounds and were usually hired for menial labour or heavy agricultural work. With restrictions imposed on the immigration of Japanese men after 1907, most of the early Japanese immigrants after 1907 were women, either the wives of Japanese immigrants or women betrothed to be married (Sunahara & Oikawa, 2011).

South Asians refer to a diverse group of people with different ethnic backgrounds in India, Pakistan, Bangladesh, and Sri Lanka. The first South Asians in Canada were Sikhs whose origins were in the Punjab region of India. The first group of Sikhs arrived in Vancouver in 1904 from Hong Kong, attracted by stories of high wages from British Indian troops who had travelled through Canada the previous year (Buchignani, 2010). They were encouraged by Hong Kong–based agents of the Canadian Pacific Railway who had seen travel on their passenger liners plummet with the head tax imposed on Chinese immigration. Most of the first Sikhs in Canada arrived via Hong Kong or Malaysia, where the British had typically employed them as policemen, watchmen, and caretakers. They were originally from rural areas of Punjab and mortgaged their properties for passage with the prospect of sending money home. Many arrived in Canada unable to speak English but eventually found employment in mills, factories, the railway, and Okanagan orchards (Johnston, 1989). By 1908 there were over 5,000 South Asians in British Columbia, 90% of them Sikh. Many of them settled in Abbotsford (Buchignani, 2010).

History of Intergroup Relations

Asian Canadians were subject to particularly harsh racism in British Columbia and elsewhere in Canada in the 19th and 20th centuries. Based on orientalist stereotypes, they were not considered "suitable" for Canadian citizenship. The 1902 Royal Commission on Chinese and Japanese Immigration declared that the Japanese and Chinese were "unfit for full citizenship. They are so nearly allied to a servile class that they are obnoxious to a free community and dangerous to the state" (CBC, 2001). The right of Asians to vote, own property, and seek employment, as well as their ability to immigrate

and integrate into Canadian society were therefore severely restricted. The right to vote federally and provincially was denied to Chinese Canadians in 1874, Japanese Canadians in 1895, and South Asians in 1907. This disenfranchisement also prevented these groups from having access to political office, jury duty, the professions like law, civil service jobs, underground mining jobs, and labour on public works because these all required being on provincial voters lists. Voting rights were only returned to Chinese and South Asian Canadians in 1947 and to Japanese Canadians in 1949, whereas immigration restrictions were not removed until the 1960s.

In the late 19th and early 20th centuries, the immigration of Chinese workers to Canada, especially during the final stages of the building of Canadian Pacific Railway, led to increasing numbers of single Chinese men in the country who sought to bring their wives to join them. The imposition of "head taxes" of $50 in 1885 and $500 in 1903 were attempts to restrict Chinese immigration. As the Chinese workers were typically paid much lower wages than workers of European origin, various Asian exclusion leagues developed to press for further restrictions on Asian immigration. This led to riots in Vancouver in 1907 and eventually in 1923 to a complete ban on Chinese immigration.

For similar reasons, the immigration of Japanese men was restricted to 400 a year after 1907, and further reduced to 150 individuals a year after 1928. Their success in the fishing industry led the federal fisheries department to arbitrarily reduce Japanese trolling licences by one-third in 1922. They, like the Chinese, were also subject to "yellow peril" hysteria. When the Japanese, many veterans of the Russo-Japanese war of 1905, successfully defended their community against white supremacist mobs in the 1907 anti-Asian riots in Vancouver, they were accused of smuggling a secret army into Canada (Sunahara & Oikawa, 2011). An even uglier action was the establishment of Japanese internment camps of World War II, discussed earlier as an illustration of expulsion.

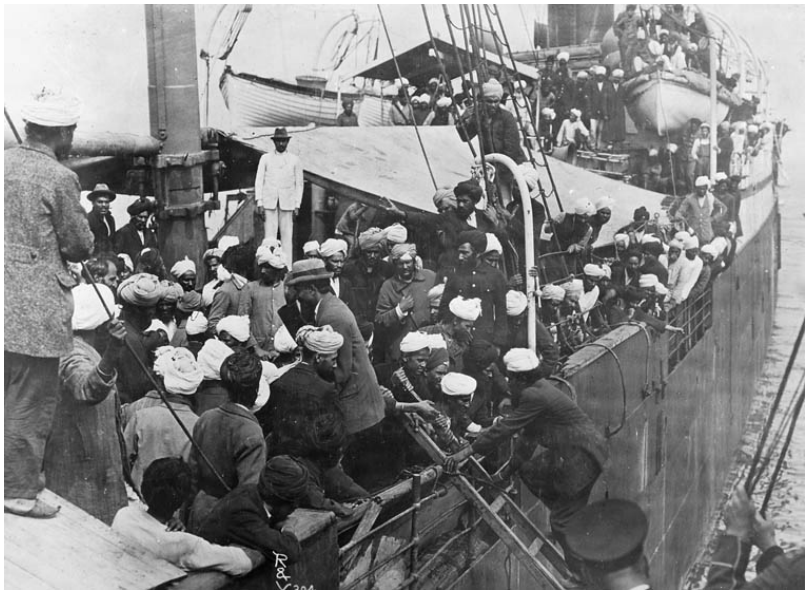


Figure 11.16. South Asians aboard the Komagata Maru in English Bay, Vancouver, in 1914. (Photo courtesy of Library and Archives Canada/Wikimedia Commons).

Of the three groups, South Asians were the most recent to arrive. However, by 1908 the large number of arrivals led to the imposition of immigration restrictions. As the South Asians were British subjects, the restrictions took a more devious form, however. Immigrants from South Asia were obliged to possess at least $200 on arrival (very challenging considering that in British India they might be able to earn 10 to 20 cents a day), and they had to arrive in Canada by continuous passage from India. The government then put pressure on steamship companies not to sell direct through-passage tickets from Indian ports. The famous incident of the freighter Komagata Maru in 1914 was a direct consequence of this restriction. The ship, carrying 376 South Asian immigrants, many of whom had boarded in Hong Kong, was prevented from docking and kept in isolation in Vancouver harbour for two months until forced to return to Asia. Only 20 of the 376 passengers were allowed to stay in Canada (Johnston, 1989).

Current Status

Asian Canadians certainly have been subject to their share of racial prejudice, despite their seemingly positive stereotype today as the model minority. The **model minority** stereotype is applied to a minority group that is seen as reaching significant educational, professional, and socioeconomic levels without challenging the existing establishment. In the 2006 census, those identifying as Japanese earned 120% of the income of white Canadians, Chinese 88.6%, and South Asians 83.3% (Block & Galabuzi, 2011).

This stereotype is typically applied to Asian groups in Canada, and it can result in unrealistic expectations, putting a stigma on members of this group that do not meet the expectations. Stereotyping all Asians as smart, industrious, and capable can also lead to a lack of much-needed government assistance and to educational and professional discrimination. Some critics speak of a "bamboo ceiling" when it comes to Asians reaching the highest echelons of corporate success. It has been difficult for Asian Canadians to overcome the stereotypes that they are passive, lack communication skills, are "techies," or not "real" Canadians.

Key Terms

assimilation: The process by which a minority individual or group takes on the characteristics of the dominant culture.

conquest: The forcible subjugation of territory and people by military action.

culture of prejudice: The theory that prejudice is embedded in our culture.

discrimination: Prejudiced action against a group of people.

dominant: Can be used interchangeably with the term majority.

dominant group: A group of people who have more power in a society than any of the subordinate groups.

ethical relativism: The idea that all cultures and all cultural practices have equal value.

ethnicity: Shared culture, which may include heritage, language, religion, and more.

exogamy: Refers to marriage outside of the group (community, tribe, etc.).

expulsion: When a dominant group forces a subordinate group to leave a certain area or the country.

genocide: The deliberate annihilation of a targeted (usually subordinate) group.

group-specific rights: Rights conferred on individuals by virtue of their membership in a group.

hybridity: The process by which different racial and ethnic groups combine to create new or emergent cultural forms and practices.

institutional racism: When a societal system has developed with an embedded disenfranchisement of a group.

internal colonialism: The process of uneven regional development by which a dominant group establishes control over existing populations within a country by maintaining segregation of ethnic and racial groups.

intersection theory: Theory that suggests we cannot separate the effects of race, class, gender, sexual orientation, and other attributes.

minority group: Any group of people who are singled out from others for differential and unequal treatment.

miscegenation: The blending of different racialized groups through sexual relations, procreation, marriage, or cohabitation.

model minority: The stereotype applied to a minority group that is seen as reaching higher educational, professional, and socioeconomic levels without protest against the majority establishment.

multiculturalism: The recognition of cultural and racial diversity and of the equality of different cultures.

prejudice: Biased thought based on flawed assumptions about a group of people.

racial profiling: The selection of individuals for greater surveillance, policing, or treatment on the basis of racialized characteristics.

racial steering: When real estate agents direct prospective homeowners toward or away from certain neighbourhoods based on their race.

racialization: The social process by which certain social groups are marked for unequal treatment based on perceived physiological differences.

racism: A set of attitudes, beliefs, and practices used to justify the belief that one racial category is somehow superior or inferior to others.

scapegoat theory: A theory stating that the dominant group will displace its unfocused aggression onto a subordinate group.

segregation: The physical separation of two groups, particularly in residence, but also in workplace and social functions.

settler society: A society historically based on colonization through foreign settlement and displacement of Aboriginal inhabitants.

stereotypes: Oversimplified ideas about groups of people.

strategy for the management of diversity: The systematic methods used to resolve conflicts, or potential conflicts, between groups that arise based on perceived differences.

subordinate: Can be used interchangeably with the term minority.

subordinate group: A group of people who have less power than the dominant group.

white privilege: The benefits people receive simply by being part of the dominant group.

visible minority: Persons, other than Aboriginal persons, who are non-Caucasian in race or non-white in colour.

Section Summary

11.1. Racial, Ethnic, and Minority Groups

Race is fundamentally a social construct. Ethnicity is a term that describes shared culture and national origin. Minority groups are defined by their lack of power.

11.2. Stereotypes, Prejudice, and Discrimination

Stereotypes are oversimplified ideas about groups of people. Prejudice refers to thoughts and feelings, while discrimination refers to actions. Racism refers to the belief that one race is inherently superior or inferior to other races.

11.3. Theories of Race and Ethnicity

Functionalist views of race study the role dominant and subordinate groups play to create a stable social structure. Critical sociologists examine power disparities and struggles between various racial and ethnic groups. Interactionists see race and ethnicity as important sources of individual identity and social symbolism. The concept of culture of prejudice recognizes that all people are subject to stereotypes that are ingrained in their culture.

11.4. Intergroup Relations and the Management of Diversity

Intergroup relations range from a tolerant approach of pluralism to intolerance as severe as genocide. In pluralism, groups retain their own identity. In assimilation, groups conform to the identity of the dominant group. In assimilation, groups combine to form a new group identity.

11.5. Race and Ethnicity in Canada

The history of the Canadian people contains an infinite variety of experiences that sociologists understand follow patterns. From the Aboriginal people who first inhabited these lands to the waves of immigrants over the past 500 years, migration is an experience with many shared characteristics. Most groups have experienced various degrees of prejudice and discrimination as they have gone through the process of assimilation.

Section Quiz

11.1. Racial, Ethnic, and Minority Groups

1. The racial term “black Canadian” can refer to _____.

1. A black person living in Canada
2. People whose ancestors came to Canada through the slave trade
3. A white person who originated in Africa and now lives in Canada
4. Any of the above

2. What is the one defining feature of a minority group?

1. Self-definition
2. Numerical minority
3. Lack of power
4. Strong cultural identity

3. Ethnicity describes shared _____.

1. Beliefs
2. Language
3. Religion
4. Any of the above

4. Which of the following is an example of a numerical majority being treated as a subordinate group?

1. Jewish people in Germany
2. Creoles in New Orleans
3. White people in Brazil
4. Blacks under apartheid in South Africa

5. Scapegoat theory shows that _____.

1. Subordinate groups blame dominant groups for their problems
2. Dominant groups blame subordinate groups for their problems
3. Some people are predisposed to prejudice
4. All of the above

11.2. Stereotypes, Prejudice, and Discrimination

6. Stereotypes can be based on _____.

1. Race
2. Ethnicity
3. Gender
4. All of the above

7. What is discrimination?

1. Biased thoughts against an individual or group
2. Biased actions against an individual or group
3. Belief that a race different from yours is inferior
4. Another word for stereotyping

8. Which of the following is the best explanation of racism as a social fact?

1. It needs to be eradicated by laws.

2. It is like a magic pill.
3. It does not need the actions of individuals to continue.
4. None of the above

11.3. Theories of Race and Ethnicity

9. As a Caucasian in Canada, being reasonably sure that you will be dealing with authority figures of the same race as you is a result of _____.

1. Intersection theory
2. Conflict theory
3. White privilege
4. Multiculturalism

10. The Speedy Gonzales cartoon character is an example of _____.

1. Intersection theory
2. Stereotyping
3. Interactionist view
4. Culture of prejudice

11.4. Intergroup Relations and the Management of Diversity

11. Which intergroup relation displays the least tolerance?

1. Segregation
2. Assimilation
3. Genocide
4. Expulsion

12. What doctrine justified legal segregation in the American South?

1. Jim Crow
2. *Plessey v. Ferguson*
3. *De jure*
4. Separate but equal

13. What intergroup relationship is represented by the "mosaic" metaphor?

1. Assimilation
2. Pluralism
3. Expulsion
4. Segregation

14. Assimilation is represented by the _____ metaphor.

1. Melting pot
2. Mosaic
3. Salad bowl
4. Separate but equal

11.5. Race and Ethnicity in Canada

15. What makes aboriginal Canadians unique as a subordinate group in Canada?

1. They are the only group that experienced expulsion.
2. They are the only group that was segregated.
3. They are the only group that was enslaved.
4. They are the only group that did not come here as immigrants.

16. Which subordinate group is often referred to as the "model minority?"

1. Black Canadians
2. Asian Canadians
3. White ethnic Canadians
4. First Nations

17. Which federal act or program was designed to address Québécois nationalism?

1. Official Languages Act
2. The Treaty of Utrecht
3. The Multiculturalism Act
4. The repatriation of the Constitution

18. The Komagata Maru incident affected which visible minority?

1. Métis
2. Japanese
3. South Asians
4. Chinese

19. Which of the following groups is not considered a visible minority in Canada?

1. The *Issei*
2. Somali Canadians
3. Sikhs
4. Aboriginal Canadians

[Quiz answers at end of chapter]

Short Answer

11.1. Racial, Ethnic, and Minority Groups

1. Why do you think the term "minority" has persisted when the word "subordinate" is more descriptive?
2. How do you describe your ethnicity? Do you include your family's country of origin? Do you consider yourself multiethnic? How does your ethnicity compare to that of the people you spend most of your time with?

11.2. Stereotypes, Prejudice, and Discrimination

1. How does racial stereotyping contribute to institutionalized racism?

2. Give an example of stereotyping that you see in everyday life. Explain what would need to happen for this to be eliminated.

11.3. Theories of Race and Ethnicity

1. Give three examples of white privilege. Do you know people who have experienced this? From what perspective?
2. What is the worst example of intersection theory you can think of? What are your reasons for thinking it is the worst?

11.4. Intergroup Relations and the Management of Diversity

1. Do you believe immigration laws should foster an approach of pluralism, assimilation, or amalgamation? Which perspective do you think is most supported by current Canadian immigration policies?
2. Which intergroup relation do you think is the most beneficial to the subordinate group? To society as a whole? Why?

11.5. Race and Ethnicity in Canada

1. In your opinion, which group had the easiest time coming to this country? Which group had the hardest time? Why?
2. Which group has made the most socioeconomic gains? Why do you think that group has had more success than others?

Further Research

11.1. Racial, Ethnic, and Minority Groups

Explore aspects of race and ethnicity at PBS's site, "What Is Race?": http://www.pbs.org/race/001_WhatIsRace/001_00-home.htm

11.2. Stereotypes, Prejudice, and Discrimination

How far should multicultural rights extend? Read more about multiculturalism in a world perspective at the Multiculturalism Policies in Contemporary Democracies website: http://www.queensu.ca/mcp/home

11.3. Theories of Race and Ethnicity

Do you know someone who practises white privilege? Do you practise it? Explore the concept with this white privilege checklist [PDF] to see how much of it holds true for you or others: http://www.sap.mit.edu/content/pdf/white_privilege_checklist.pdf

11.4. Intergroup Relations and the Management of Diversity

So you think you know your own assumptions? Check and find out with the Implicit Association Test: https://implicit.harvard.edu/implicit/canada/takeatest.html

11.5. Race and Ethnicity in Canada

Are people interested in reclaiming their ethnic identities? Read this article and decide: "The White Ethnic Revival": http://historynewsnetwork.org/article/23824

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Solutions to Section Quiz

1 D, | 2 C, | 3 D, | 4 D, | 5 B, | 6 D, | 7 B, | 8 C, | 9 C, | 10 B, | 11 C, | 12 D, | 13 B, | 14 A, | 15 D, | 16 B, | 17 A, | 18 C, | 19 D, [Return to quiz]

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10

Chapter 12. Gender, Sex, and Sexuality

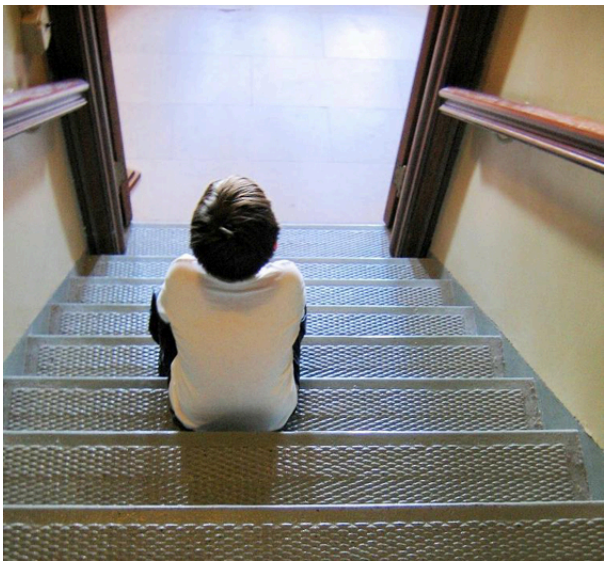


Figure 12.1. Some children may learn at an early age that their gender does not correspond with their sex. (Photo courtesy of trazomfreak/flickr)

Learning Objectives

12.1. The Difference between Sex, Gender and Sexuality

- Define and differentiate between sex, gender, and sexuality.
- Analyze the relationship between society and biology in formations of gender identity.
- Understand and discuss the role of homophobia and heterosexism in society.
- Distinguish between transgendered, transsexual, intersexual, and homosexual identities.
- Analyze the dominant gender schema and how it influences social perceptions of sex and gender.

12.2. Gender

- Explain the influence of socialization on gender roles in Canada.
- Understand the effect of gender inequality in major North American institutions.
- Describe the functionalist, critical and symbolic interactionist perspectives on gender.

12.3. Sex and Sexuality

- Understand different attitudes associated with sex and sexuality.
- Define sexual inequality in various societies.
- Describe the functionalist, critical, symbolic interactionist, and queer theory perspectives on sex and sexuality.

Introduction to Gender, Sex, and Sexuality

In 2009, the 18-year old South African athlete, Caster Semenya, won the women's 800-meter world championship in Track and Field. Her time of 1:55:45, a surprising improvement from her 2008 time of 2:08:00, caused officials from the International Association of Athletics Foundation (IAAF) to question whether her win was legitimate. If this questioning were based on suspicion of steroid use, the case would be no different from that of Roger Clemens or Mark McGuire, or even Track and Field Olympic gold medal winner Marion Jones. But the questioning and eventual testing were based on allegations that Caster Semenya, no matter what gender identity she possessed, was biologically a male.

You may be thinking that distinguishing biological maleness from biological femaleness is surely a simple matter — just conduct some DNA or hormonal testing, throw in a physical examination, and you'll have the answer. But it is not that simple. Both biologically male and biologically female people produce a certain amount of testosterone, and different laboratories have different testing methods, which makes it difficult to set a specific threshold for the amount of male hormones produced by a female that renders her sex male. The International Olympic Committee (IOC) criteria for determining eligibility for sex-specific events are not intended to determine biological sex. "Instead these regulations are designed to identify circumstances in which a particular athlete will not be eligible (by reason of hormonal characteristics) to participate in the 2012 Olympic Games" in the female category (International Olympic Committee, 2012).

To provide further context, during the 1996 Atlanta Olympics, eight female athletes with XY chromosomes underwent testing and were ultimately confirmed as eligible to compete as women (Maugh, 2009). To date, no males have undergone this sort of testing. Does this not imply that when women perform better than expected, they are "too masculine," but when men perform well they are simply superior athletes? Can you imagine Usain Bolt, the world's fastest man, being examined by doctors to prove he was biologically male based solely on his appearance and athletic ability?
Can you explain how sex, sexuality, and gender are different from each other?

In this chapter, we will discuss the differences between sex and gender, along with issues like gender identity and sexuality. What does it mean to "have" a sex in our society? What does it mean to "have" a sexuality? We will also explore various theoretical perspectives on the subjects of gender and sexuality.

12.1. The Difference between Sex, Gender, and Sexuality



Figure 12.2. While the biological differences between males and females are fairly straightforward, the social and cultural aspects of being a man or woman can be complicated. (Photo courtesy of FaceMePLS/flickr)

When filling out a document such as a job application or school registration form you are often asked to provide your name, address, phone number, birth date, and sex or gender. But have you ever been asked to provide your sex *and* your gender? As with most people, it may not have occurred to you that sex and gender are not the same. However, sociologists and most other social scientists view sex and gender as conceptually distinct. **Sex** refers to physical or physiological differences between males and females, including both primary sex characteristics (the reproductive system) and secondary characteristics such as height and muscularity. **Gender** is a term that refers to social or cultural distinctions and roles associated with being male or female. **Gender identity** is the extent to which one identifies as being either masculine or feminine (Diamond, 2002). As gender is such a primary dimension of identity, socialization, institutional participation, and life chances, sociologists refer to it as a *core status.*

The distinction between sex and gender is key to being able to examine gender and sexuality as social variables rather than biological variables. Contrary to the common way of thinking about it, gender is not determined by biology in any simple way. For example, the anthropologist Margaret Mead's cross cultural research in New Guinea, in the 1930s, was groundbreaking in its demonstration that cultures differ markedly in the ways that they perceive the gender "temperments" of men and women; i.e., their masculinity and femininity (Mead, 1963). Unlike the qualities that defined masculinity and femininity in North America at the time, she saw both genders among the Arapesh as sensitive, gentle, cooperative, and passive, whereas among the Mundugumor both genders were assertive, violent, jealous, and aggressive. Among the Tchambuli, she described male and female temperaments as the opposite of those observed in North America. The women appeared assertive, domineering, emotionally inexpressive, and managerial, while the men appeared emotionally dependent, fragile, and less responsible.

The experience of transgendered people also demonstrates that a person's sex, as determined by his or her biology, does not always correspond with his or her gender. Therefore, the terms *sex* and *gender* are not interchangeable. A baby boy who is born with male genitalia will be identified as male. As he grows, however, he may identify with the feminine aspects of his culture. Since the term *sex* refers to biological or physical distinctions, characteristics of sex will not vary significantly between different human societies. For example, it is physiologically normal for persons of the female sex, regardless of culture, to eventually menstruate and develop breasts that can lactate. The signs and characteristics of gender, on the other hand, may vary greatly between different societies as Margaret Mead's research noted. For example, in American culture, it is considered feminine (or a trait of the female gender) to wear a dress or skirt. However, in many Middle Eastern, Asian, and African cultures, dresses or skirts (often referred to as sarongs, robes, or gowns) can be considered masculine. The kilt worn by a Scottish male does not make him appear feminine in his culture.



Figure 12.3. George Catlin (1796-1872), Dance to the Berdache. Caitlin's sketch depicts a ceremonial dance among the Sac and Fox Indians to celebrate the two-spirit person. (Photo couresy of Wikimedia Commons).

The dichotomous view of gender (the notion that one is either male or female) is specific to certain cultures and is not

universal. In some cultures, gender is viewed as fluid. In the past, some anthropologists used the term *berdache* or two spirit person to refer to individuals who occasionally or permanently dressed and lived as the opposite gender. The practice has been noted among certain Aboriginal groups (Jacobs, Thomas, and Lang, 1997). Samoan culture accepts what they refer to as a "third gender." *Fa'afafine*, which translates as "the way of the woman," is a term used to describe individuals who are born biologically male but embody both masculine and feminine traits. Fa'afafines are considered an important part of Samoan culture. Individuals from other cultures may mislabel them as homosexuals because fa'afafines have a varied sexual life that may include men or women (Poasa, 1992).

Making Connections: Social Policy and Debate

The Legalese of Sex and Gender

The terms *sex* and *gender* have not always been differentiated in the English language. It was not until the 1950s that American and British psychologists and other professionals working with intersex and transsexual patients formally began distinguishing between sex and gender. Since then, psychological and physiological professionals have increasingly used the term gender (Moi, 2005). By the end of the 20th century, expanding the proper usage of the term *gender* to everyday language became more challenging — particularly where legal language is concerned. In an effort to clarify usage of the terms *sex* and *gender*, U.S. Supreme Court Justice Antonin Scalia wrote in a 1994 briefing, "The word gender has acquired the new and useful connotation of cultural or attitudinal characteristics (as opposed to physical characteristics) distinctive to the sexes. That is to say, gender is to sex as feminine is to female and masculine is to male" (*J.E.B. v. Alabama*, 144 S. Ct. 1436 [1994]). Supreme Court Justice Ruth Bader Ginsburg had a different take, however. Viewing the words as synonymous, she freely swapped them in her briefings so as to avoid having the word "sex" pop up too often. It is thought that her secretary supported this practice by suggestions to Ginsberg that "those nine men" (the other Supreme Court justices), "hear that word and their first association is not the way you want them to be thinking" (Case, 1995).

In Canada, there has not been the same formal deliberations on the legal meanings of sex and gender. The distinction between sex as a physiological attribute and gender as social attribute has been used without controversy. However, things can get a little tricky when biological "sex" is regarded as simply a natural fact, especially in the case of transsexuals (Cowan, 2005). For example, in British Columbia, people who have surgery to change their anatomical sex can apply through the provisions of the Vital Statistics Act to have their birth certificate changed to reflect their post-operative sex. If a person was born male, does this mean that after surgery that person is fully regarded as a female in the eyes of the law? In the 2002 case of *Nixon v. Vancouver Rape Relief Society,* a male to female transsexual, Kimberly Nixon brought an application to the B.C. Human Rights Tribunal that she had been discriminated against by the Vancouver Rape Relief Society (VRR) when her application to volunteer as a helper was rejected. The controversy was not over whether Kimberly was a woman, but whether she was woman *enough* for the position. VRR argued that as Kimberly had not grown up as a woman, she did not have the requisite lived experience as a woman in patriarchal society to counsel women rape victims. The B.C. Human Rights Tribunal ruled against VRR, finding that they had discriminated against Kimberly as a transsexual. The ruling was overturned by the Supreme Court of British Columbia, which argued that the Act "did not address all the potential legal consequences of sex reassignment surgery" (Cowan, 2005, p. 87). The court acknowledged that the meaning of both sex and gender vary in different contexts. The case is currently under appeal.

These legal issues reveal that even human experience that is assumed to be biological and personal (such as our self-perception and behaviour) is actually a socially defined variable by culture. The question of "what makes a woman" in the case of *Nixon v. Vancouver Rape Relief Society* is a matter of legal decision making as much as it is a matter of biology or lived experience.

Sexuality

Sexuality refers to a person's capacity for sexual feelings and their emotional and sexual attraction to a particular sex

(male or female). Sexuality or sexual orientation is typically divided into four categories: *heterosexuality*, the attraction to individuals of the opposite sex; *homosexuality*, the attraction to individuals of one's own sex; *bisexuality*, the attraction to individuals of either sex; and *asexuality*, no attraction to either sex. Heterosexuals and homosexuals may also be referred to informally as "straight" and "gay," respectively. North America is a heteronormative society, meaning it supports heterosexuality as the norm, (referred to as **heteronormativity**). Consider that homosexuals are often asked, "When did you know you were gay?" but heterosexuals are rarely asked, "When did you know that you were straight?" (Ryle, 2011).

According to current scientific understanding, individuals are usually aware of their sexual orientation between middle childhood and early adolescence (American Psychological Association, 2008). They do not have to participate in sexual activity to be aware of these emotional, romantic, and physical attractions; people can be celibate and still recognize their sexual orientation. Homosexual women (also referred to as lesbians), homosexual men (also referred to as gays), and bisexuals of both genders may have very different experiences of discovering and accepting their sexual orientation. At the point of puberty, some may be able to claim their sexual orientations while others may be unready or unwilling to make their homosexuality or bisexuality known since it goes against North American society's historical norms (APA, 2008).

Alfred Kinsey was among the first to conceptualize sexuality as a continuum rather than a strict dichotomy of gay or straight. To classify this continuum of heterosexuality and homosexuality, Kinsey created a six-point rating scale that ranges from exclusively heterosexual to exclusively homosexual (see Figure 12.4). In his 1948 work *Sexual Behavior in the Human Male*, Kinsey writes, "Males do not represent two discrete populations, heterosexual and homosexual. The world is not to be divided into sheep and goats … The living world is a continuum in each and every one of its aspects" (Kinsey et al, 1948).

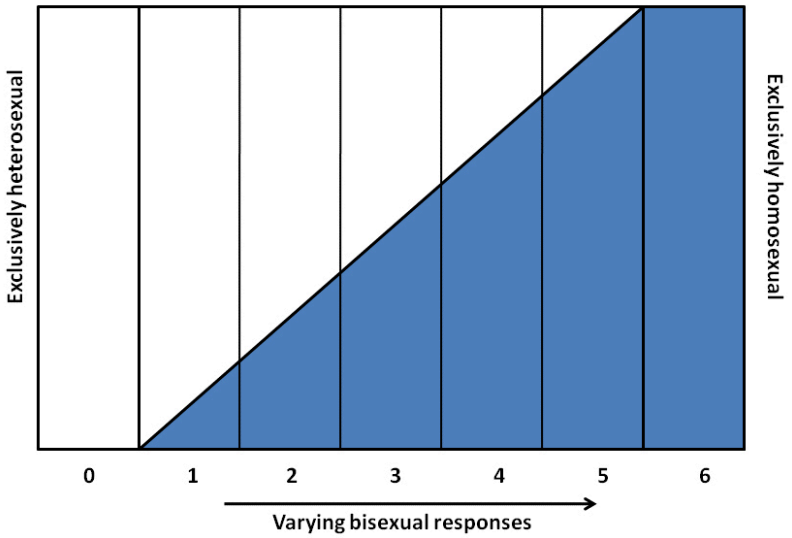


Figure 12.4. The Kinsey scale indicates that sexuality can be measured by more than just heterosexuality and homosexuality.

Later scholarship by Eve Kosofsky Sedgwick expanded on Kinsey's notions. She coined the term "homosocial" to oppose "homosexual," describing nonsexual same-sex relations. Sedgwick recognized that in North American culture, males are subject to a clear divide between the two sides of this continuum, whereas females enjoy more fluidity. This can be illustrated by the way women in Canada can express homosocial feelings (nonsexual regard for people of the same sex) through hugging, hand-holding, and physical closeness. In contrast, Canadian males refrain from these expressions since they violate the heteronormative expectation. While women experience a flexible norming of variations of behaviour that spans the heterosocial-homosocial spectrum, male behaviour is subject to strong social sanction if it veers into homosocial territory because of societal homophobia (Sedgwick, 1985).

There is no scientific consensus regarding the exact reasons why an individual holds a heterosexual, homosexual, or bisexual orientation. There has been research conducted to study the possible genetic, hormonal, developmental, social, and cultural influences on sexual orientation, but there has been no evidence that links sexual orientation to one factor

(APA, 2008). Research, however, does present evidence showing that homosexuals and bisexuals are treated differently than heterosexuals in schools, the workplace, and the military. The 2009 Canadian Climate Survey reported that 59% of LGBT (lesbian, gay, bisexual, or transgendered) high school students had been subject to verbal harassment at school compared to 7% of non-LGBT students; 25% had been subject to physical harassment compared to 8% of non-LGBT students; 31% had been subject to cyber-bullying (via internet or text messaging) compared to 8% of non-LGBT students; 73% felt unsafe at school compared to 20% of non-LGBT students; and 51% felt unaccepted at school compared to 19% of non-LGBT students (Taylor and Peter, 2011).

Much of this discrimination is based on stereotypes, misinformation, and **homophobia** — an extreme or irrational aversion to homosexuals. Major policies to prevent discrimination based on sexual orientation have not come into effect until the last few years. In 2005, the federal government legalized same-sex marriage. The Civil Marriage Act now describes marriage in Canada in gender neutral terms: "Marriage, for civil purposes, is the lawful union of two persons to the exclusion of all others" (Civil Marriage Act, S.C. 2005, c. 33). The Canadian Human Rights Act was amended in 1996 to explicitly prohibit discrimination based on sexual orientation, including the unequal treatment of gay men, lesbians, and bisexuals. Organizations such as Egale Canada (Equality for Gays And Lesbians Everywhere) advocate for LGBT rights, establish gay pride organizations in Canadian communities, and promote gay-straight alliance support groups in schools. Advocacy agencies frequently use the acronym LGBTQ, which stands for "lesbian, gay, bisexual, transgendered," and "queer" or "questioning."

Gender Roles

As we grow, we learn how to behave from those around us. In this socialization process, children are introduced to certain roles that are typically linked to their biological sex. The term **gender role** refers to society's concept of how men and women are expected to act and how they should behave. These roles are based on norms, or standards, created by society. In Canadian culture, masculine roles are usually associated with strength, aggression, and dominance, while feminine roles are usually associated with passivity, nurturing, and subordination. Role learning starts with socialization at birth. Even today, our society is quick to outfit male infants in blue and girls in pink, even applying these colour-coded gender labels while a baby is in the womb.

One way children learn gender roles is through play. Parents typically supply boys with trucks, toy guns, and superhero paraphernalia, which are active toys that promote motor skills, aggression, and solitary play. Girls are often given dolls and dress-up apparel that foster nurturing, social proximity, and role play. Studies have shown that children will most likely choose to play with "gender appropriate" toys (or same-gender toys) even when cross-gender toys are available because parents give children positive feedback (in the form of praise, involvement, and physical closeness) for gender-normative behaviour (Caldera, Huston, and O'Brien, 1998). See Chapter 5 (Socialization) for further elaboration on the socialization of gender roles.

The drive to adhere to masculine and feminine gender roles continues later in life. Men tend to outnumber women in professions such as law enforcement, the military, and politics. Women tend to outnumber men in care-related occupations such as child care, health care, and social work. These occupational roles are examples of typical Canadian male and female behaviour, derived from our culture's traditions. Adherence to these occupational gender roles demonstrates fulfillment of social expectations, but not necessarily personal preference (Diamond, 2002).

Gender Identity

Canadian society allows for some level of flexibility when it comes to acting out gender roles. To a certain extent, men can assume some feminine roles and characteristics and women can assume some masculine roles and characteristics without interfering with their gender identity. **Gender identity** is an individual's self-conception of being male or female based on his or her association with masculine or feminine gender roles.

As opposed to **cisgendered** individuals, who identify their gender with the gender and sex they were assigned at birth, individuals who identify with the gender that is the opposite of their biological sex are **transgendered**. Transgendered males, for example, although assigned the sex 'female' at birth, have such a strong emotional and psychological connection to the forms of masculinity in society that they identify their gender as male. The parallel connection to femininity exists



Figure 12.5. Fathers tend to be more involved when their sons engage in gender appropriate activities such as sports. (Photo courtesy of stephanski/flickr)

for transgendered females. It is difficult to determine the prevalence of transgenderism in society. Statistics Canada states that they have neither the definitive number of people whose sexual orientation is lesbian, gay, or bisexual, nor the number of people who are transgendered (Statistics Canada, 2011). However, it is estimated that 2 to 5% of the U.S. population is transgendered (Transgender Law and Policy Institute, 2007).

Transgendered individuals who wish to alter their bodies through medical interventions such as surgery and hormonal therapy — so that their physical being is better aligned with their gender identity — are called **transsexuals.** They may also be known as male-to-female (MTF) or female-to-male (FTM) transsexuals. Not all transgendered individuals choose to alter their bodies: many will maintain their original anatomy but may present themselves to society as the opposite gender. This is typically done by adopting the dress, hairstyle, mannerisms, or other characteristic typically assigned to the opposite gender. It is important to note that people who cross-dress, or wear clothing that is traditionally assigned to the opposite gender, are not necessarily transgendered. Cross-dressing is typically a form of self-expression, entertainment, or personal style, not necessarily an expression of gender identity (APA, 2008).

There is no single, conclusive explanation for why people are transgendered. Transgendered expressions and experiences are so diverse that it is difficult to identify their origin. Some hypotheses suggest biological factors such as genetics, or prenatal hormone levels, as well as social and cultural factors, such as childhood and adulthood experiences. Most experts believe that all of these factors contribute to a person's gender identity (APA, 2008).

It is known that transgendered and transsexual individuals experience discrimination based on their gender identity. People who identify as transgendered are twice as likely to experience assault or discrimination as non-transgendered individuals; they are also one and a half times more likely to experience intimidation (National Coalition of Anti-Violence Programs, 2010). Organizations such as the Canadian Professional Association for Transgender Health (CPATH), Trans

Pulse, and the National Center for Trans Equality work to support and prevent, respond to, and end all types of violence against transgendered, transsexual, and homosexual individuals. These organizations hope that by educating the public about gender identity and empowering transgendered and transsexual individuals, this violence will end.

The Dominant Gender Schema



Figure 12.6. Chaz Bono is the transgendered son of Cher and Sonny Bono. Being transgendered is not about clothing or hairstyles; it is about self-perception. (Photo courtesy of Greg Hernandez/flickr)

As sociological research points out, the naturalness with which one assumes a gender identity of being either masculine or feminine, or a sexual identity of being sexually attracted to either men or women, has a significant social component. Gender and sexual identities are deep identities in the sense that one does not seem to choose them. They seem to "come over" one, sometimes at a very early age, and thereafter appear for most people to be fixed. Nevertheless they are sustained by social norms and conventions. This social aspect of gender or sexual identity is revealed especially through the research tradition in sociology that focuses on those who break the rules of society. By studying those who break the rules, the rules themselves and what they entail become visible. In the study of gender and sexuality, the experience of intersexuals, transgendered individuals, transsexuals, gays, lesbians, bisexuals, fetishists, and sexual "perverts," etc. are invaluable for understanding what it means to have a gender or a sexuality. These individuals make up a minority of the population, but their lives and struggles reveal the existence of the social norms and processes of which others are often unaware.

Part of having a sexuality or a gender has to do with the "naturalness" with which an individual assumes one of the most fundamental identities that define their place in the world. However, having a gender or sexual identity only appears natural to the degree that one fits within the **dominant gender schema** (Devor, 2000). The dominant gender schema is an ideology that, like all ideologies, serves to perpetuate inequalities in power and status. This schema states that: a) sex is a biological characteristic that produces only two options, male or female, and b) gender is a social or psychological characteristic that manifests or expresses biological sex. Again, only two options exist, masculine or feminine: "All persons

are either one gender or the other. No person can be neither. No person can be both. No person can change gender without major medical intervention" (Devor, 2000).

For many people this is natural. It goes without saying. However, if one does not fit within the dominant gender schema, then the naturalness of one's gender identity is thrown into question. This occurs, first of all, by the actions of external authorities and experts who define those who do not fit as either mistakes of nature or as products of failed socialization and individual psychopathology. Gender identity is also thrown into question by the actions of peers and family who respond with concern or censure when a girl is not feminine enough or a boy is not masculine enough. Moreover, the ones who do not fit also have questions. They may begin to wonder why the norms of society do not reflect their sense of self, and thus begin to feel at odds with the world.

As the capacity to differentiate between the genders is the basis of patriarchal relations of power that have existed for 6,000 years, the dominant gender schema is one of the fundamental organizing principles that maintains the dominant societal order. Nevertheless, it is only a *schema*: a cultural distinction that is imposed upon the diversity of world. With respect to the biology of gender and sexuality, Anne Fausto-Sterling (2000) argues that a body's sex is too complex to fit within the obligatory dual sex system, and ultimately, the decision to label someone male or female is a social decision.

Fausto-Sterling's research on hermaphrodite or **intersex** children — the 1.7% of children who are born with a mixture of male and female sexual organs — indicates that there are at least *five* different sexes:

1. male;
2. female;
3. herms: true hermaphrodites with both male and female gonads (i.e., testes *and* ovaries);
4. merms: male pseudo-hermaphrodites with testes and a mixture of sexual organs; and
5. ferms: female pseudo-hermaphrodites with ovaries and a mixture of sexual organs.

Nevertheless, because assigning a sex identity is a fundamental *cultural* priority, doctors will typically decide "nature's intention" with respect to intersex babies within 24 hours of an intersex child being born. Sometimes this decision involves surgery, which has scarred individuals for life (Fausto-Sterling, 2000).

Similarly, with respect to the variability of gender and sexuality, the experiences of gender and sexual outsiders — homosexuals, bisexuals, transsexuals, women who do not look or act "feminine" and men who do not look or act "masculine," etc. — reveal the subtle dramaturgical order of social processes and negotiations through which all gender identity is sustained and recognized by others (refer to the dramaturgical analysis of Erving Goffmann from Chapter 22). Because we do not usually have the capacity to "look under the hood" to clinically determine the sex of someone we encounter, we read their gender from their "gender display"– their "conventionalized portrayals" of the "culturally established correlates of sex" (Goffman, 1977). Gender is a performance which is enhanced by props like clothing and hairstyle, or mannerisms like tone of voice, physical bearing, and facial expression.

For a movie star like Marilyn Munroe, the gender display is exaggerated almost to the point of self-satire, whereas for *gender blending* women — women who do not dress or look stereotypically like women — the gender display can be (unintentionally) ambiguous to the point where they are often mistaken for men (Devor, 2000). The signs of gender need to be communicated in an unambiguous manner for an individual to "pass" as a member of their assigned gender. This is often a problem for transgendered and transsexual individuals and the cause of considerable stress and anxiety.

Making Connections: Sociology in the Real World

Intersexed Individuals and the Case of John/Joan

Part of the rationale of using surgery to "correct" the sexual ambiguity of intersex children is the idea that not having a clear biological sex assignment will produce psychological pathology later in life. Secondly, the rationale is based on the idea that gender or sexual identity is fundamentally malleable (Fausto-Sterling, 2000). The practice is based on the logic of the nurture side of the long-standing debate about whether *nature* or *nurture* determines psycho-sexual development.

The nurture side argues that gender is neutral at birth and is subsequently moulded by sex assignation and child rearing (i.e., "environment") into a stable gender identity as the child matures. This is the principle behind using surgery to modify indefinite sexual organs. It is understood that having an unambiguous penis or vagina is a clear *symbolic* marker of gender identity in ones relationship to self and others. Whereas gender formation during childhood is malleable, gender ambiguity later in life is pathological and therefore surgery at an early age is required to avoid psychosexual problems in teenage and adult life.

The nature side, on the other hand, argues that gender is not neutral at birth. Gender is predetermined by the *in utero* hormonal processes that lead to the sexual development of the foetus. Even in intersex children, there is a distinct psychosexual predisposition to one gender or the other. Early in foetal development hormones act directly to organize the brain along gender lines, and the release of hormones at puberty produce sex-specific characteristics and behaviours.

The life of David Reimer, known in the literature of the 1960s and 1970s as the John/Joan case, was used for many years as a demonstration of the validity of nurture arguments over nature arguments. In some respects it seemed like a perfect case to test the two propositions. David Reimer was born in Winnipeg, in 1965, as a male identical twin. However, as a result of a circumcision accident at age 7 months he lost his penis. Experts counseled that David should be surgically altered and raised as a girl. At age two David, known as "John" in the literature, had his testes removed and he became "Joan." Her mother was cited in the literature as saying that Joan loved wearing dresses, hated getting dirty, and enjoyed having her hair set. As Joan's biologically identical male twin continued to mature in a manner typical to boys, it seemed to demonstrate the dominant influence of gendered patterns of child-rearing on the formation of gender identity. Joan was being raised as a girl, her male sex organs had been surgically altered, and her transition from boy to girl seemed unproblematic. From the point of view of the nurture side of the debate, the case demonstrated that gender identity was primarily learned (Fausto-Sterling, 2000).

However, in 1980, a BBC documentary doing a follow up on the famous case discovered that by the time Joan was thirteen she was not well adjusted to her sex assignment (Fausto-Sterling, 2000). She peed standing up, walked like a boy, wanted to be a mechanic and thought boys had better lives than girls. Eventually it came out that she had eventually had her breasts removed, had a surgically reconstructed penis implanted, and had married a woman and was fathering his wife's child. Contradicting the original findings, John/Joan's mother reported that Joan had consistently resisted attempts to socialize her as a girl. Sadly, following a period of severe depression, David Reimer killed himself at the age of 38. The failure of the sex reassessment lent credence to the nature side of the debate. It seemed to demonstrate that humans are not psycho-sexually neutral at birth, but are biologically predisposed to behave in a male or female manner.

The literature is not conclusive. There have been other reports of individuals in similar circumstances rejecting their sex assignments but in the case of another Canadian child whose sex reassessment occurred at seven months, much earlier than David Reimer's, gender identity was successfully changed (Bradley et. al., 1998). Nevertheless, while this subject identified as a female, she was a tomboy during childhood, worked in a blue-collar masculine trade, did have love affairs with men but at the time of the report was living as a lesbian. The authors argue that her gender identity was successfully changed through surgery and socialization, even if her gender role and sexual orientation were not.

Fausto-Sterling's (2000) conclusion is that gender and sex are fundamentally complex and that it is not a simple question of either nurture or nature being the determinant factor. This complexity has practical implications for how to respond to the birth of intersex children. In particular, she outlines practical medical ethics for sexually ambiguous children:

1. Let there be no unnecessary infant surgery: do no harm;
2. Let physicians assign a *provisional* sex based on known probabilities of gender identity formation; and
3. Provide full information and long-term counseling to the parents and child.

Fausto-Sterling argues that it is important to recognize the variability of sex and gender beyond the two-sex system.

12.2. Gender



Figure 12.7. Traditional images of North American gender roles reinforce the idea that women should be subordinate to men. (Photo courtesy of Sport Suburban/Flickr)

Gender and Socialization

The organization of society is profoundly *gendered*, meaning that the "natural" distinction between male and female, and the attribution of different qualities to each, underlies institutional structures from the family, to the occupational structure, to the division between public and private, to access to power and beyond. **Patriarchy** is the set of institutional structures (like property rights, access to positions of power, and relationship to sources of income) which are based on the belief that men and women are dichotomous and *unequal* categories. How does the "naturalness" of the distinction between male and female get established? How does it serve to organize everyday life?

The phrase "boys will be boys" is often used to justify behaviour such as pushing, shoving, or other forms of aggression from young boys. The phrase implies that such behaviour is unchangeable and something that is part of a boy's nature. Aggressive behaviour, when it does not inflict significant harm, is often accepted from boys and men because it is congruent with the cultural script for masculinity. The "script" written by society is in some ways similar to a script written by a playwright. Just as a playwright expects actors to adhere to a prescribed script, society expects women and men to behave according to the expectations of their respective gender role. Scripts are generally learned through a process known as *socialization*, which teaches people to behave according to social norms.

Socialization

Children learn at a young age that there are distinct expectations for boys and girls. Cross-cultural studies reveal that children are aware of gender roles by age two or three. At four or five, most children are firmly entrenched in culturally appropriate gender roles (Kane, 1996). Children acquire these roles through socialization, a process in which people learn to behave in a particular way as dictated by societal values, beliefs, and attitudes. For example, society often views riding a motorcycle as a masculine activity and, therefore, considers it to be part of the male gender role. Attitudes such as this are typically based on stereotypes — oversimplified notions about members of a group. Gender stereotyping involves

overgeneralizing about the attitudes, traits, or behaviour patterns of women or men. For example, women may be thought of as too timid or weak to ride a motorcycle.



Figure 12.8. Although our society may have a stereotype that associates motorcycles with men, female bikers demonstrate that a woman's place extends far beyond the kitchen in modern Canada. (Photo courtesy of Robert Couse-Baker/Flickr)

Gender stereotypes form the basis of sexism. **Sexism** refers to prejudiced beliefs that value one sex over another. Sexism varies in its level of severity. In parts of the world where women are strongly undervalued, young girls may not be given the same access to nutrition, health care, and education as boys. Further, they will grow up believing that they deserve to be treated differently from boys (Thorne, 1993; UNICEF, 2007). While illegal in Canada when practised as discrimination, unequal treatment of women continues to pervade social life. It should be noted that discrimination based on sex occurs at both the micro- and macro-levels. Many sociologists focus on discrimination that is built into the social structure; this type of discrimination is known as *institutional discrimination* (Pincus, 2008).

Gender socialization occurs through four major agents of socialization: family, education, peer groups, and mass media. Each agent reinforces gender roles by creating and maintaining normative expectations for gender-specific behaviour. Exposure also occurs through secondary agents such as religion and the workplace. Repeated exposure to these agents over time leads men and women into a false sense that they are acting naturally rather than following a socially constructed role.

Family is the first agent of socialization. There is considerable evidence that parents socialize sons and daughters differently. Generally speaking, girls are given more latitude to step outside of their prescribed gender role (Coltrane and Adams, 2004; Kimmel, 2000; Raffaelli and Ontai, 2004). However, differential socialization typically results in greater privileges afforded to boys. For instance, sons are allowed more autonomy and independence at an earlier age than daughters. They may be given fewer restrictions on appropriate clothing, dating habits, or curfew. Sons are also often free from performing domestic duties such as cleaning or cooking, and other household tasks that are considered feminine. Daughters are limited by their expectation to be passive, nurturing, and generally obedient, and to assume many of the domestic responsibilities.

Even when parents set gender equality as a goal, there may be underlying indications of inequality. For example, when dividing up household chores, boys may be asked to take out the garbage or perform other tasks that require strength or toughness, while girls may be asked to fold laundry or perform duties that require neatness and care. It has been found that fathers are firmer in their expectations for gender conformity than are mothers, and their expectations are stronger for sons than they are for daughters (Kimmel, 2000). This is true in many types of activities, including preference of toys, play styles, discipline, chores, and personal achievements. As a result, boys tend to be particularly attuned to their father's disapproval when engaging in an activity that might be considered feminine, like dancing or singing (Coltrane and Adams, 2008). It should be noted that parental socialization and normative expectations vary along lines of social class, race, and ethnicity. Research in the United States has shown that African American families, for instance, are more likely than Caucasians to model an egalitarian role structure for their children (Staples and Boulin Johnson, 2004).

The reinforcement of gender roles and stereotypes continues once a child reaches school age. Until very recently, schools were rather explicit in their efforts to stratify boys and girls. The first step toward stratification was segregation. Girls were encouraged to take home economics or humanities courses and boys to take shop, math, and science courses.

Studies suggest that gender socialization still occurs in schools today, perhaps in less obvious forms (Lips, 2004). Teachers may not even realize that they are acting in ways that reproduce gender-differentiated behaviour patterns. Yet, any time they ask students to arrange their seats or line up according to gender, teachers are asserting that boys and girls should be treated differently (Thorne, 1993).

Even in levels as low as kindergarten, schools subtly convey messages to girls indicating that they are less intelligent or less important than boys. For example, in a study involving teacher responses to male and female students, data indicated that teachers praised male students far more than their female counterparts. Additionally, teachers interrupted girls more and gave boys more opportunities to expand on their ideas (Sadker and Sadker, 1994). Further, in social as well as academic situations, teachers have traditionally positioned boys and girls oppositionally — reinforcing a sense of competition rather than collaboration (Thorne, 1993). Boys are also permitted a greater degree of freedom regarding rule-breaking or minor acts of deviance, whereas girls are expected to follow rules carefully and to adopt an obedient posture (Ready, 2001). Schools reinforce the polarization of gender roles and the age-old "battle of the sexes" by positioning girls and boys in competitive arrangements.

Mimicking the actions of significant others is the first step in the development of a separate sense of self (Mead, 1934). Like adults, children become agents who actively facilitate and apply normative gender expectations to those around them. When children do not conform to the appropriate gender role, they may face negative sanctions such as being criticized or marginalized by their peers. Though many of these sanctions are informal, they can be quite severe. For example, a girl who wishes to take karate class instead of dance lessons may be called a "tomboy" and face difficulty gaining acceptance from both male and female peer groups (Ready, 2001). Boys, especially, are subject to intense ridicule for gender nonconformity (Coltrane and Adams, 2008; Kimmel, 2000).

Mass media serves as another significant agent of gender socialization. In television and movies, women tend to have less significant roles and are often portrayed as wives or mothers. When women are given a lead role, they are often one of two extremes: a wholesome, saint-like figure or a malevolent, hypersexual figure (Etaugh and Bridges, 2003). This same inequality is pervasive in children's movies (Smith, 2008). Research indicates that of the 101 top-grossing G-rated movies released between 1990 and 2005, three out of four characters were male. Out of those 101 movies, only seven were near being gender balanced, with a character ratio of less than 1.5 males per 1 female (Smith, 2008).

Television commercials and other forms of advertising also reinforce inequality and gender-based stereotypes. Women are almost exclusively present in ads promoting cooking, cleaning, or child care-related products (Davis, 1993). Think about the last time you saw a man star in a dishwasher or laundry detergent commercial. In general, women are underrepresented in roles that involve leadership, intelligence, or a balanced psyche. Of particular concern is the depiction of women in ways that are dehumanizing, especially in music videos. Even in mainstream advertising, however, themes intermingling violence and sexuality are quite common (Kilbourne, 2000).

Social Stratification and Inequality

How do the distinctions between male and female, and the social attribution of different qualities to each, serve to organize our institutions (the family, occupational structure, and the public/private divide, etc.)? How do these distinctions organize differential access to rewards, privileges, and power? In society, how and why are women not treated as the equals of men?

Stratification refers to a system in which groups of people experience unequal access to basic, yet highly valuable, social resources. According to George Murdock's classic work, *Outline of World Cultures* (1954), all societies classify work by gender. When a pattern appears in all societies, it is called a *cultural universal*. While the phenomenon of assigning work by gender is universal, its specifics are not. The same task is not assigned to either men or women worldwide. But the way each task's associated gender is valued is notable. In Murdock's examination of the division of labour among 324 societies around the world, he found that in nearly all cases the jobs assigned to men were given greater prestige (Murdock and White, 1969). Even if the job types were very similar and the differences slight, men's work was still considered more vital.

Canadian society is also characterized by gender stratification. Evidence of gender stratification is especially keen within



Figure 12.9. Emily Murphy (1868-1933) was the first female magistrate in Canada and the British Commonwealth. She was one of the "Famous Five" who challenged the law that women were not "persons" and therefore not eligible for appointment to the Canadian Senate. (Image courtesy of Wikimedia Commons)

the economic realm. In Canada, women's experience with wage labour includes unequal treatment in comparison to men in many respects:

- Women continue to do more of the unpaid labour in the household — meal preparation and cleanup, childcare, elderly care, household management, and shopping — even if they have a job outside the home. In 2010, women spent an average 50 hours a week looking after children compared to 24.4 hours a week for men, 13.8 hours a week doing household work compared to 8.3 hours for men, and, of those caring for elderly family members, 49% of women spent more than 10 hours a week caring for a senior compared to 25% for men (Statistics Canada, 2011). This double duty keeps working women in a subordinate role in the family structure and prevents them from achieving the salaries of men in the paid workforce (Hochschild and Machung, 1989).
- Women's participation in the labour force has been increasing from 42% of women in 1976 to 58% of women in 2009 (Statistics Canada, 2011). Women now make up 48% of the total labour force (compared to 37% in 1976). They continue to dominate in "pink collar" occupations and part-time work, which are low paying, low status, often unskilled jobs that offer little possibility for advancement. In 2009, 67% of women still worked in traditionally "feminine" occupations like teaching, nursing, clerical, administrative or sales, and service jobs. 70% of part-time and 60% of minimum wage workers were women (Ferrao, 2010).
- Despite women making up nearly half (48%) of payroll employment, men vastly outnumber them in authoritative, powerful, and, therefore, high-earning jobs (Statistics Canada, 2011). Women's income for full-year, full-time workers has remained at 72% of the income of men since 1992. This in part reflects the fact that women are more likely than men to work in part time or temporary employment. The comparison of average hourly wage is better: Women earned 83% of men's average hourly wage in 2008, up from 76% in 1988 (Statistics Canada, 2011). However, as one report noted, if the gender gap in wages continues to close at the same glacial rate, women will not earn the same as men until the year 2240 (McInturff, 2013).

The reason for the gender gap in wages is fourfold. Firstly, there is **gender discrimination** in hiring and salary. Women and men are often not rewarded equally for the same work despite the fact discrimination on the basis of sex is unconstitutional in Canada. Secondly, as we noted above, men and women tend to be concentrated in different types of

work which are not equally paid. Often because of choices made in high school and postsecondary education, women are limited to pink collar types of occupation. Thirdly, the unequal distribution of domestic duties, especially child and elder care, women are unable to work the same number of hours as men and experience disruptions in their career path. Fourthly, the work typically done by women is arbitrarily undervalued with respect to the work typically performed by men. It is certainly questionable that early childhood education occupations dominated by women involve less skill, less training, or less significance to society than many trades dominated by men, but there is a clear disparity in wages between these typically gender segregated types of occupation.

Beyond the economic sphere, there has been a long history of power relations based on gender in Canada. When looking to the past, it would appear that society has made great strides in terms of abolishing some of the most blatant forms of gender inequality (see timeline below) but the underlying effects of male dominance still permeate many aspects of society. The issue remains especially pertinent with regard to political representation. As elected representatives, the ratio of women to men in federal parliament and provincial legislatures is about 1 in 4, or 25% (McInturff, 2013).

- Before 1859 — Married women were not allowed to own or control property
- Before 1909 — Abducting a woman who was not an heiress was not a crime
- Before 1918 — Women were not permitted to vote (propertied women's right to vote was taken away in New France in 1849)
- Before 1929 — Women were not legally considered "persons"
- Before 1953 — Employers could legally pay a woman less than a man for the same work
- Before 1969 — Women did not have the right to a safe and legal abortion (Nellie McClung Foundation, N.d.)



Figure 12.10. In some cultures, women do all of the household chores with no help from men, as doing housework is a sign of weakness which is considered by society as a feminine trait. (Photo courtesy of Evil Erin/Flickr)

Making Connections: Sociological Research

Is the Patriarchy Dead?

It is becoming more common to hear post-feminist arguments that in liberal democracies like Canada, the war against patriarchy (i.e., male rule) has more or less been won. The days in which women were not permitted to work or hold a credit card in their own name are over. Today women are working outside the home more than ever, they are narrowing the wage gap with men (albeit slowly), and they are surpassing men in getting university degrees. They are now as free as men to have a credit card and get into debt. These arguments are more complicated than the post-

feminist slogan "patriarchy is dead" suggests, but it is clear that the question of gender inequality is more ambiguous than it once was.

Table 12.1. Women's wages as a percentage of men's in Canada, from 1988 to 2008.

[Skip Table]

Year	Age Group						
	Total	**25 to 29**	**30 to 34**	**35 to 39**	**40 to 44**	**45 to 49**	**50 to 5**
1988	0.757	0.846	0.794	0.768	0.736	0.681	0.645
1993	0.794	0.905	0.886	0.772	0.762	0.700	0.709
1998	0.811	0.901	0.851	0.805	0.808	0.750	0.749
2003	0.825	0.920	0.868	0.843	0.804	0.768	0.771
2008	0.833	0.901	0.858	0.837	0.825	0.784	0.807
Change: 1988 to 2008	0.076	0.056	0.064	0.068	0.089	0.103	0.162

Source Statistics Canada, 2011.

As noted above, women's annual income (for full-time employees) remains at 72% of that earned by men. However, this figure is misleading because it does not take into account that men on average work 3.7 hours more a week than women (Statistics Canada, 2011, p. 167). Table 12.1 (above) compares men's and women's hourly wage and shows that between 1988 and 2008, the wage gap has narrowed for each of the age groups. On average, women went from earning 76% of men's hourly wage to 83%. Young women ages 25 to 29 now earn 90% of young men's hourly wage. As the Statistics Canada report says, "younger women are more likely to have high levels of education, work full-time, and be employed in different types of jobs than their older female counterparts" (Statistics Canada, 2011), which accounts for the difference between the age groups.

However, is this a good news story? First, the difference between the 72% figure (gender difference in annual income) and the 83% figure (gender difference in hourly wage) reveals, for reasons which are unclear from the statistics, that women are not working in occupations that pay as well or offer as many hours of work per week as men's occupations. Second, the gender gap is closing in large part because men's wages have remained flat or decreased. In particular, young men who worked traditionally in high paying manufacturing jobs have seen declines in union coverage and real wages (Drolet, 2011, p. 8). Third, even though young women have higher levels of education than young men, and even though they choose to work in higher paying jobs in education and health than previous generations of women, they still earn 10% less per hour than young men. That is still a substantial difference in wages that is unaccounted for. Fourth, the real problem is that although men and women increasingly begin their careers on equal footing, by mid-career, when workers are beginning to maximize their earning potential, women fall behind and continue to do so into retirement. Why?

Theoretical Perspectives on Gender

Sociological theories serve to guide the research process and offer a means for interpreting research data and explaining social phenomena. For example, a sociologist interested in gender stratification in education may study why middle-school girls are more likely than their male counterparts to fall behind grade-level expectations in math and science. Another scholar might investigate why women are underrepresented in political office, while another might examine how women members of Parliament are treated by their male counterparts in meetings.

Structural Functionalism

Structural functionalism provided one of the most important perspectives of sociological research in the 20th century and has been a major influence on research in the social sciences, including gender studies. Viewing the family as the

most integral component of society, assumptions about gender roles within marriage assume a prominent place in this perspective.

Functionalists argue that gender roles were established well before the preindustrial era when men typically took care of responsibilities outside of the home, such as hunting, and women typically took care of the domestic responsibilities in or around the home. These roles were considered functional because women were often limited by the physical restraints of pregnancy and nursing, and unable to leave the home for long periods of time. Once established, these roles were passed on to subsequent generations since they served as an effective means of keeping the family system functioning properly.

When changes occurred in the social and economic climate of Canada during World War II, changes in the family structure also occurred. Many women had to assume the role of breadwinner (or modern hunter and gatherer) alongside their domestic role in order to stabilize a rapidly changing society. When the men returned from war and wanted to reclaim their jobs, society fell into a state of imbalance, as many women did not want to forfeit their wage-earning positions (Hawke, 2007).

Talcott Parsons (1943) argued that the contradiction between occupational roles and kinship roles of men and women in North America created tension or strain on individuals as they tried to adapt to the conflicting norms or requirements. The division of traditional middle-class gender roles within the family — the husband as breadwinner and wife as homemaker — was functional for him because the roles were complementary. They enabled a clear division of labour between spouses, which ensured that the ongoing functional needs of the family were being met. Within the North American kinship system, wives' and husbands' roles were equally valued according to Parsons. However, within the occupational system, only the husband's role as breadwinner was valued. There was an "asymmetrical relation of the marriage pair to the occupational structure" (p. 191). Being barred from the occupational system meant that women had to find a functional equivalent to their husbands' occupational status to demonstrate their "fundamental equality" to their husbands. As a result, Parson theorized that these tensions would lead women to become expressive specialists in order to claim prestige (e.g., showing "good taste" in appearance, household furnishings, literature, and music), while men would remain instrumental or technical specialists and become culturally narrow. He also proposed that the instability of women's roles in this system would lead to excesses like neurosis, compulsive domesticity, garishness in taste, disproportionate attachment to community or club activities, and the "glamour girl" pattern: "the use of specifically feminine devices as an instrument of compulsive search for power and exclusive attention" (p. 194).

Critical Sociology

According to critical sociology, society is structured by relations of power and domination among social groups (e.g., women versus men) that determine access to scarce resources. When sociologists examine gender from this perspective, we can view men as the dominant group and women as the subordinate group. According to critical sociology, social problems and contradictions are created when dominant groups exploit or oppress subordinate groups. Consider the women's suffrage movement or the debate over women's "right to choose" their reproductive futures. It is difficult for women to rise above men, as dominant group members create the rules for success and opportunity in society (Farrington and Chertok, 1993).

Friedrich Engels, a German sociologist, studied family structure and gender roles in the 1880s. Engels suggested that the same owner-worker relationship seen in the labour force is also seen in the household, with women assuming the role of the proletariat. Women are therefore doubly exploited in capitalist society, both when they work outside the home and when they work within the home. This is due to women's dependence on men for the attainment of wages, which is even worse for women who are entirely dependent upon their spouses for economic support. Contemporary critical sociologists suggest that when women become wage earners, they can gain power in the family structure and create more democratic arrangements in the home, although they may still carry the majority of the domestic burden, as noted earlier (Risman and Johnson-Sumerford, 1998).

Feminist Theory

Feminist theory is a type of critical sociology that examines inequalities in gender-related issues. It also uses the critical approach to examine the *maintenance* of gender roles and inequalities. Radical feminism, in particular, considers the role of the family in perpetuating male dominance. In patriarchal societies, men's contributions are seen as more valuable than

those of women. Women are essentially the property of men. Through the feminist struggles for women's emancipation in post-feudal modern society, the property relationship has been formally eliminated. Nevertheless, women still tend to be relegated to the private sphere, where domestic roles define their primary status identity. Whereas men's roles and primary status is defined by their activities in the public or occupational sphere.

As a result, women often perceive a disconnect between their personal experiences and the way the world is represented by society as a whole. Dorothy Smith referred to this phenomenon as **bifurcated consciousness** (Smith, 1987). There is a division between the directly lived, bodily experience of women's worlds (e.g., their responsibilities for looking after children, aging parents, and household tasks) and the dominant, abstract, institutional world to which they must adapt (the work and administrative world of bureaucratic rules, documents, and cold, calculative reasoning). There are two modes of knowing, experiencing, and acting that are directly at odds with one another (Smith, 2008). Patriarchal perspectives and arrangements, widespread and taken for granted, are built into the relations of ruling. As a result, not only do women find it difficult to find their experiences acknowledged in the wider patriarchal culture, their viewpoints also tend to be silenced or marginalized to the point of being discredited or considered invalid.

Sanday's study of the Indonesian Minangkabau (2004) revealed that in societies that some consider to be matriarchies (where women are the dominant group), women and men tend to work cooperatively rather than competitively, regardless of whether a job is considered feminine by North American standards. The men, however, do not experience the sense of bifurcated consciousness under this social structure that modern Canadian females encounter (Sanday, 2004).

Symbolic Interactionism

Symbolic interactionism aims to understand human behaviour by analyzing the critical role of symbols in human interaction. This is certainly relevant to the discussion of masculinity and femininity. Imagine that you walk into a bank, hoping to get a small loan for school, a home, or a small business venture. If you meet with a male loan officer, you may state your case logically by listing all of the hard numbers that make you a qualified applicant as a means of appealing to the analytical characteristics associated with masculinity. If you meet with a female loan officer, you may make an emotional appeal by stating your good intentions as a means of appealing to the caring characteristics associated with femininity.

Because the meanings attached to symbols are socially created and not natural, and fluid, not static, we act and react to symbols based on the current assigned meaning. The word *gay*, for example, once meant "cheerful," but by the 1960s it carried the primary meaning of "homosexual." In transition, it was even known to mean "careless" or "bright and showing" (Oxford American Dictionary, 2010). Furthermore, the word *gay* (as it refers to a homosexual) carried a somewhat negative and unfavourable meaning 50 years ago, but has since gained more neutral and even positive connotations.

These shifts in symbolic meaning apply to family structure as well. In 1976, when only 27.6% of married women with preschool-aged children were part of the paid workforce, a working mother was still considered an anomaly and there was a general view that women who worked were "selfish" and not good mothers. Today, a majority of women with preschool-aged children are part of the paid workforce (66.5%), and a working mother is viewed as more normal (Statistics Canada, 2011).

Sociologist Charles H. Cooley's concept of the "looking-glass self" (1902) can also be applied to interactionist gender studies. Cooley suggests that one's determination of self is based mainly on the view of society (for instance, if society perceives a man as masculine, then that man will perceive himself as masculine). When people perform tasks or possess characteristics based on the gender role assigned to them, they are said to be **doing gender** (West and Zimmerman, 1987). Whether we are expressing our masculinity or femininity, West and Zimmerman argue, we are *always* "doing gender." Thus, gender is something we *do* or perform, not something we *are*.

Making Connections: Sociological Research

Being Male, Being Female, and Being Healthy

In 1971, Broverman and Broverman conducted a groundbreaking study on the traits mental health workers ascribed to males and females. When asked to name the characteristics of a female, the list featured words such as unaggressive,

gentle, emotional, tactful, less logical, not ambitious, dependent, passive, and neat. The list of male characteristics featured words such as aggressive, rough, unemotional, blunt, logical, direct, active, and sloppy (Seem and Clark, 2006). Later, when asked to describe the characteristics of a healthy person (not gender specific), the list was nearly identical to that of a male.

This study uncovered the general assumption that being female is associated with being somewhat unhealthy or not of sound mind. This concept seems extremely dated, but in 2006, Seem and Clark replicated the study and found similar results. Again, the characteristics associated with a healthy male were very similar to that of a healthy (genderless) adult. The list of characteristics associated with being female broadened somewhat but did not show significant change from the original study (Seem and Clark, 2006). This interpretation of feminine characteristics may help us one day to better understand gender disparities in certain illnesses, such as why one in eight women can be expected to develop clinical depression in her lifetime (National Institute of Mental Health 1999). Perhaps these diagnoses are not just a reflection of women's health, but also a reflection of society's labeling of female characteristics, or the result of institutionalized sexism.

12.3. Sex and Sexuality



Figure 12.11. Sexual practices can differ greatly among groups. Recent trends reveal that married couples have sex more frequently than do singles, and that 27% of married couples in their 30s have sex at least twice a week (NSSHB, 2010). (Photo courtesy of epSos.de/Flickr)

Sexual Attitudes and Practices

In the area of sexuality, sociologists focus their attention on sexual attitudes and practices, not on physiology or anatomy. As noted above, **sexuality** is viewed as a person's capacity for sexual feelings and the orientation of those feelings. Studying sexual attitudes and practices is a particularly interesting field of sociology because sexual behaviour is a cultural universal. Throughout time and place, the vast majority of human beings have participated in sexual relationships (Broude, 2003). Each society, however, interprets sexuality and sexual activity in different ways. Many societies around the world have different attitudes about premarital sex, the age of sexual consent, homosexuality, masturbation, and other sexual behaviours that are not consistent with universally cultural norms (Widmer, Treas, and Newcomb, 1998). At the same time, sociologists have learned that certain norms (like the disapproval of incest) are shared among most societies. Likewise, societies generally have norms that reinforce their accepted social system of sexuality.

What is considered "normal" in terms of sexual behaviour is based on the mores and values of the society. Societies

that value monogamy, for example, would likely oppose extramarital sex. Individuals are socialized to sexual attitudes by their family, education system, peers, media, and religion. Historically, religion has been the greatest influence on sexual behaviour in most societies, but in more recent years, peers and the media have emerged as two of the strongest influences — particularly with North American teens (Potard, Courtois, and Rusch, 2008). Let us take a closer look at sexual attitudes in Canada and around the world.

Sexuality around the World

Cross-national research on sexual attitudes in industrialized nations reveals that normative standards differ across the world. For example, several studies have shown that Scandinavian students are more tolerant of premarital sex than are North American students (Grose, 2007). A study of 37 countries reported that non-Western societies — like China, Iran, and India — valued chastity highly in a potential mate, while Western European countries — such as France, the Netherlands, and Sweden — placed little value on prior sexual experiences (Buss, 1989).

Even among Western cultures, attitudes can differ. For example, according to a 33,590-person survey across 24 countries, 89% of Swedes responded that there is nothing wrong with premarital sex, while only 42% of Irish responded this way. From the same study, 93% of Filipinos responded that sex before age 16 is always wrong or almost always wrong, while only 75% of Russians responded this way (Widmer, Treas, and Newcomb, 1998). Sexual attitudes can also vary within a country. For instance, 45% of Spaniards responded that homosexuality is always wrong, while 42% responded that it is never wrong; only 13% responded somewhere in the middle (Widmer, Treas, and Newcomb, 1998).

Of industrialized nations, Sweden is thought to be the most liberal when it comes to attitudes about sex, including sexual practices and sexual openness. The country has very few regulations on sexual images in the media, and sex education, which starts around age six, is a compulsory part of Swedish school curricula. Sweden's permissive approach to sex has helped the country avoid some of the major social problems associated with sex. For example, rates of teen pregnancy and sexually transmitted disease are among the world's lowest (Grose, 2007). It would appear that Sweden is a model for the benefits of sexual freedom and frankness. However, implementing Swedish ideals and policies regarding sexuality in other, more politically conservative, nations would likely be met with resistance.

Sexuality in Canada

Canada is often considered to be conservative and "stodgy" compared to the United States, which prides itself on being the land of the "free." However, the United States is much more restrictive when it comes to its citizens' general attitudes about sex. In the 1998 international survey noted above, 12% of Canadians stated that premarital sex is always wrong, compared to 29% of Americans. The average among the 24 countries surveyed on this question was 17%. Compared to 71% of Americans, 55% of Canadians condemned sex before the age of 16 years, 68% compared to 80% (U.S.) condemned extramarital sex, and 39% compared to 70% (U.S.) condemned homosexuality (Widmer, Treas, and Newcomb, 1998). A 2013 international study showed that to the question "Should society accept homosexuality?" 80% of Canadians said "yes" compared to 14% who said "no." Whereas, in the United States 60% said "yes" and 33% said "no" (Pew Research Center, 2013).

North American culture is particularly restrictive in its attitudes about sex when it comes to women and sexuality. It is widely believed that men are more sexual than women. In fact, there is a popular notion that men think about sex every seven seconds. Research, however, suggests that men think about sex an average of 19 times per day, compared to 10 times per day for women (Fisher, Moore, and Pittenger, 2011).

The belief that men have — or have the right to — more sexual urges than women creates a double standard. Ira Reiss, a pioneer researcher in the field of sexual studies, defined the **double standard** as prohibiting premarital sexual intercourse for women but allowing it for men (Reiss, 1960). This standard has evolved into allowing women to engage in premarital sex only within committed love relationships, but allowing men to engage in sexual relationships with as many partners as they wish without condition (Milhausen and Herold, 1999). Due to this double standard, a woman is likely to have fewer sexual partners in her lifetime than a man. According to a Centers for Disease Control and Prevention (CDC) 2011 survey, the average 35-year-old woman has had three opposite-sex sexual partners while the average 35-year-old man has had twice as many (Centers for Disease Control, 2011). In a study of 1,479 Canadians over the age of 18, men had had an

average of 11.25 sexual partners over their lifetime whereas women had an average of 4 (Fischtein, Herold, and Desmarais, 2007).

Making Connections: Big Picture

The History of Homosexuality: Making Up People?



Figure 12.12. Two men in Florence kissing. Bartolomeo Cesi, 1600. (Image courtesy of Wikimedia Commons)

One of the principal insights of contemporary sociology is that a focus on the social construction of different social experiences and problems leads to alternative ways of understanding them and responding to them. The sociologist often confronts a legacy of entrenched beliefs concerning innate biological disposition, or the individual psychopathology of persons who are considered abnormal. The sexual or gender "deviant" is a primary example. However, as Ian Hacking (2006) observes, even when these beliefs about *kinds of persons* are products of objective scientific classification, the institutional context of science and expert knowledge is not independent of societal norms, beliefs, and practices. The process of classifying *kinds of people* is a social process that Hacking calls "making up people" and Howard Becker (1963) calls "labeling."

A homosexual was first defined as a *kind of person* in the 19th century: the sexual "invert." This definition was "scientific," but in no way independent of the cultural norms and prejudices of the times. The idea that homosexuals were characterized by an internal, deviant "inversion" of sexual instincts depended on the new scientific disciplines of biology and psychiatry (Foucault, 1980). The homosexual's deviance was defined first by the idea that heterosexuality was biologically natural (and therefore "normal") and second by the idea that, psychologically, sexual preference defined every aspect of the personality. Within the emerging field of psychiatry, it was possible to speak of an inverted personality because a lesbian woman who did not play the "proper" passive sexual role of her gender was masculine. A gay man who did not play his "proper" active sexual role was effeminate. After centuries during which an individual's sexual preference was largely a matter of public indifference, in the 19th century, the problem of sexuality suddenly emerged as a biological, social, psychological, and moral concern.

The new definitions of homosexuality and sexual inversion led to a series of social anxieties that ranged from a threat to the propagation of the human species, to the perceived need to "correct" sexual deviation through psychiatric and medical treatments. The powerful normative constraints that emerged based largely on the 19th century scientific

distinction between natural and unnatural forms of sexuality lead to the legacy of closeted sexuality and homophobic violence that remains to this day. Nevertheless, they depend on the concept of the homosexual as a specific kind of person.

As Hacking (2006) points out, the category of classification, or the label that defines different kinds of people, actually influences their behaviour and self-understanding. It is a "self-fulfilling prophecy" (see Chapter 22). They begin to experience the world and live in society in a different manner than they did previously. Ironically, the gay rights movement has built on the same biological and psychiatric definitions of the homosexual as a kind of person so to reverse the negative consequences of homophobic culture. Redefining the meaning of being a homosexual type of person advances the social acceptance of gays and lesbians. To some degree the gay rights movement has accepted the idea of the homosexual as a kind of person, and they have self-identified as such, but the outcome of this relabeling has not yet completely reversed the negative connotations of being gay.

Sociological Perspectives on Sex and Sexuality

Sociologists representing all three major theoretical perspectives study the role that sexuality plays in social life today. Scholars recognize that sexuality continues to be an important factor in social hierarchies and relations of power and that the manner in which sexuality is constructed has a significant effect on perceptions, interactions, health, and outcomes.

Structural Functionalism

When it comes to sexuality, functionalists stress the importance of regulating sexual behaviour to ensure marital cohesion and family stability. Since functionalists identify the family unit as the most integral component in society, they maintain a strict focus on it at all times and argue in favour of social arrangements that promote and ensure family preservation.

Functionalists such as Talcott Parsons (1955) have long argued that the regulation of sexual activity is an important function of the family. Social norms surrounding family life have, traditionally, encouraged sexual activity within the family unit (marriage) and have discouraged activity outside of it (premarital and extramarital sex). From a functionalist point of view, the purpose of encouraging sexual activity in the confines of marriage is to intensify the bond between spouses and to ensure that procreation occurs within a stable, legally recognized relationship. This structure gives offspring the best possible chance for appropriate socialization and the provision of basic resources.

From a functionalist standpoint, homosexuality poses a potential dysfunction in terms of both the procreative role of the family and the unifying myths that the traditional family provides. Strictly speaking, homosexual couples cannot have children together so, for them at least, procreation would cease. (It is of course not the case that homosexuals are unable to marry or procreate with members of the opposite sex as this has occurred throughout history). Similarly, the deep connection — between the traditional family form, religion, cultural practices and beliefs — provides a unifying force of social cohesion that gay marriage threatens. Thus, homosexuality disrupts the existing functional order. The functions of the traditional family structure need to be served or satisfied by different family structures for a working social equilibrium to be restored. This analysis suggests that sociologists need to examine new structural forms that provide the *functional equivalents* of traditional marriage structures: the increasing legal acceptance of same-sex marriage; the emergence of new narratives about what makes a marriage legitimate (e.g., the universality of the "love bond" rather than the rites of tradition); and the rise in gay and lesbian couples who choose to bear and raise children through a variety of available resources.

Critical Sociology

From a critical perspective, sexuality is another area in which power differentials are present and where dominant groups actively work to promote their worldview as well as their economic interests. Homosexuality was criminalized in Canada in 1841. At the time of Confederation in 1867, sodomy was prohibited, and in 1890 the Canadian Criminal Code made "acts of gross indecency" between men illegal. Acts of "gross indecency" between women were not prohibited until 1953. Throughout the 1950s and 1960s, homosexuals were even treated as national security risks; hundreds of gays and lesbians lost their civil service jobs or were purged from the military, and thousands were kept under surveillance (Kinsman, 2000).

It was not until 1969 that the Criminal Code was amended to relax the laws against homosexuality. As then Justice

Minister Pierre Trudeau said in 1967 when the amendments were introduced, "Take this thing on homosexuality. I think the view we take here is that there's no place for the state in the bedrooms of the nation. I think that what's done in private between adults doesn't concern the Criminal Code. When it becomes public this is a different matter, or when it relates to minors this is a different matter" (CBC, 2012). It was not until 2005 that same-sex couples were given the right to marry. Critical sociology asks why homosexuality, and other types of sexuality, have been the subject of persecution by the dominant sexual majority.

From a critical sociology point of view, a key dimension of social inequality based on sexuality has to do with the concept of "sexuality" itself. Sexuality is caught up in the relationship between knowledge and power. As we noted above, the homosexual was first defined as a "kind of person" in the 19th century: the sexual "invert." This definition was "scientific," (at least in terms of the science of the time), but it was in no way independent of the cultural norms and prejudices of 19th century society. It was also not independent of the modern expansion of what Michel Foucault calls "micro-powers" over an increasing range of facets of the life of individuals. The early biologists, medical scientists, and psychologists viewed "sexuality" as a hidden agency that defined the viability of an individual's personality, and posed a threat at various levels to the survival and health of the population. Abnormal sexuality was associated with mental disease, threats to institutional stability, and biological pathologies within the reproduction of the species. The idea that there was a division between healthy normal sexualities and dangerous deviant sexualities — a division that required the expertise of the medical and psychological establishment to diagnose and determine — became a kind of "Trojan horse" in which the problem of sexuality entered into people's lives. As a public concern, sexuality became a danger to be controlled, surveilled, corrected, and in the worst cases, institutionalized. As Foucault (1980) describes, the sexual lives of children, "perverts," married couples and the population as a whole became increasingly subject to interventions by doctors, psychiatrists, police, government administrators, moral crusaders, and families.

Part of the power issue involved in having a sexuality or a gender therefore has to do with the *normality* of one's sexual identity and who determines what is normal or not. The norms defined by social custom, moral tradition, and scientific knowledge determine the degree of ease in which we can live within our own bodies and assume gender and sexual identities. As we noted above, having a gender or sexual identity is only experienced as normal or natural to the degree that one fits within the **dominant gender schema** — the ideological framework that states that there are only two possible sexes, male and female, and two possible genders, masculine and feminine. Sexuality is a component of the dominant gender schema in as far as — in heteronormative society — to be male is to be attracted to females and to be female is to be attracted to males. The dominant gender schema therefore provides the basis for the ways inequalities in power and status are distributed according to the degree that individuals conform to its narrow categories.

In contrast, Devor (2000) argues:

> we live in a world which is far more diverse than any number of simplistic dichotomies can describe. I have become convinced that not only can men and women live in bodies of any sex, but that we, as a society, go against reality when we insist that there are only two genders, only two sexes, and only slight variations on two basic sexualities. I have learned from speaking with transgendered and transsexed people that we diminish ourselves as a society by failing to avail ourselves of the special gifts and lessons we can receive from the transgendered, transsexed and intermediately sexed people among us.

Symbolic Interactionism

Interactionists focus on the meanings associated with sexuality and with sexual orientation. Since femininity is devalued in North American society, those who adopt such traits are subject to ridicule; this is especially true for boys or men. Just as masculinity is the symbolic norm, so too has heterosexuality come to signify normalcy.

The experiences of gender and sexual outsiders — homosexuals, bisexuals, transsexuals, women who do not look or act "feminine," men who do not look or act "masculine," etc. — reveal the subtle dramaturgical order of social processes and negotiations through which all gender identity is sustained and recognized by others. From a symbolic interactionist perspective, "passing" as a "normal" heterosexual depends on one's sexual cues and props being received and interpreted by others as passable.

The coming-out process of homosexuals is described by Vivienne Cass as a series of social stages that the individual is obliged to negotiate with others (Devor, 1997): first, a period of identity confusion in which the person attempts to

deny or resist the growing suspicion that he or she is homosexual; second, a period of identity comparison in which the person examines the series of available identity options to see which one explains his or her sense of self best; third, a period of identity tolerance in which the person recognizes "I probably am gay" and seeks out more information and contacts; fourth, a period of identity acceptance in which the person carefully manages sexual information or claims public acknowledgment of his or her sexual identity; fifth, a period of identity pride in which the person identifies strongly with his or her reference group and minimizes the value of others; and sixth, a period of identity synthesis in which the person's sexuality is naturalized, becoming "no big deal." Of course the transition between these stages is not predetermined, and it is possible to remain stuck in one stage or even to go backwards. For the homosexual, these transitions are fraught with difficulty.

To what degree does the same process apply to heterosexuals? Although the idea of coming out as a heterosexual, or as a masculine man or a feminine woman, might seem absurd, this absurdity is grounded in the norms of heteronormative society that are so deeply entrenched as to make them appear natural. The social processes of acquiring a gender and sexual identity, or of "having" a gender or a sexuality, are essentially the same; yet, the degree to which society *accepts* the resulting identities is what differs.

Interactionists are also interested in how discussions of homosexuals often focus almost exclusively on the sex lives of gays and lesbians; homosexuals, especially men, may be assumed to be hypersexual and, in some cases, deviant. Interactionism might also focus on the slurs used to describe homosexuals. Labels such as "queen" and "fag" are often used to demean homosexual men by feminizing them. This subsequently affects how homosexuals perceive themselves. Recall Cooley's "looking-glass self," which suggests that self develops as a result of one's interpretation and evaluation of the responses of others (Cooley, 1902). Constant exposure to derogatory labels, jokes, and pervasive homophobia would lead to a negative self-image, or worse, self-hate. The CDC reports that homosexual youths who experience high levels of social rejection are six times more likely to have high levels of depression and eight times more likely to have attempted suicide (CDC, 2011).

Queer Theory

Queer theory is a perspective that problematizes the manner in which we have been taught to think about sexual orientation. By calling their discipline "queer," these scholars are rejecting the effects of labelling; instead, they embrace the word "queer" and have reclaimed it for their own purposes. Queer theorists reject the dominant gender schema and the dichotomization of sexual orientations into two mutually exclusive outcomes, homosexual or heterosexual. Rather, the perspective highlights the need for a more flexible and fluid conceptualization of sexuality — one that allows for change, negotiation, and freedom. The current schema used to classify individuals as either "heterosexual" or "homosexual" pits one orientation against the other. This mirrors other oppressive schemas in our culture, especially those surrounding gender and race (Black versus White, male versus female).

Queer theorist Eve Kosofsky Sedgwick argued against North American society's monolithic definition of sexuality — against its reduction to a single factor: the sex of one's desired partner. Sedgwick identified dozens of other ways in which people's sexualities were different, such as:

- Even identical genital acts mean very different things to different people.
- Sexuality makes up a large share of the self-perceived identity of some people, a small share of others.
- Some people spend a lot of time thinking about sex, others little.
- Some people like to have a lot of sex, others little or none.
- Many people have their richest mental/emotional involvement with sexual acts that they do not do, or do not even want to do
- Some people like spontaneous sexual scenes, others like highly scripted ones, others like spontaneous-sounding ones that are nonetheless totally predictable.
- Some people, whether homosexual, heterosexual, or bisexual, experience their sexuality as deeply embedded in a matrix of gender meanings and gender differentials. Others of each sexuality do not. (Sedgwick, 1990)

In the end, queer theory strives to question the ways society perceives and experiences sex, gender, and sexuality, opening the door to new scholarly understanding.

Throughout this chapter, we have examined the complexities of gender, sex, and sexuality. Differentiating between

sex, gender, and sexual orientation is an important first step to a deeper understanding and critical analysis of these issues. Understanding the sociology of sex, gender, and sexuality will help to build awareness of the inequalities experienced by subordinate groups such as women, homosexuals, and transgendered individuals.

Key Terms

bifurcated consciousness: The experience of a division between the directly lived, bodily world of women's lives and the dominant, masculine, abstract, institutional world to which they must adapt.

cisgendered: A term that refers to individuals whose gender identity matches the gender and sex they were assigned at birth

doing gender: When people perform tasks based upon the gender assigned to them by society.

dominant gender schema: An ideological framework that states that there are only two possible sexes, male and female, and two possible genders, masculine and feminine.

double standard: A concept that prohibits premarital sexual intercourse for women, but allows it for men.

gender: A term that refers to social or cultural distinctions of behaviours that are considered male or female.

gender identity: An individual's sense of being either masculine or feminine.

gender role: Society's concept of how men and women should behave.

heteronormativity: The belief and practice that heterosexuality is the only normal sexual orientation.

homophobia: An extreme or irrational aversion to homosexuals.

intersex: Individuals with a mixture of male and female sexual organs or physical characteristics.

queer theory: A scholarly discipline that questions fixed (normative) definitions of gender and sexuality.

sex: A term that denotes the presence of physical or physiological differences between males and females.

sexism: The prejudiced belief that one sex should be valued over another.

sexuality: A person's capacity for sexual feelings and the orientation of their emotional and sexual attraction to a particular sex (male or female).

transgendered: A term that refers to individuals who identify with the behaviours and characteristics that are the opposite of their biological sex.

transsexuals: Transgendered individuals who alter their bodies through medical interventions such as surgery and hormonal therapy.

Section Summary

12.1. The Difference between Sex, Gender, and Sexuality

The terms "sex" and "gender" refer to two different identifiers. Sex denotes biological characteristics differentiating males and females, while gender denotes social and cultural characteristics of masculine and feminine behaviour. Sex and gender are not always synchronous. Individuals who strongly identify with the opposing gender are considered transgendered.

12.2. Gender

Children become aware of gender roles in their earliest years. They come to understand and perform these roles through socialization, which occurs through four major agents: family, education, peer groups, and mass media. Socialization into narrowly prescribed gender roles results in the stratification of males and females. Each sociological perspective offers a valuable view for understanding how and why gender inequality occurs in our society.

12.3. Sex and Sexuality

When studying sex and sexuality, sociologists focus their attention on sexual attitudes and practices, not on physiology or anatomy. Norms regarding gender and sexuality vary across cultures. In general, Canada tends to be less conservative than the United States in its sexual attitudes. As a result, homosexuals still continue to face opposition and discrimination in most major social institutions, but discrimination based on sexual orientation is legally prohibited in the Canadian

constitution. Gays and lesbians are able to get married in Canada, and school boards across the country have instituted anti-bullying policies to prevent the targeting of LGBT students.

Section Quiz

12.1. The Difference between Sex, Gender, and Sexuality

1. The terms "masculine" and "feminine" refer to a person's _____.

    1. Sex
    2. Gender
    3. Both sex and gender
    4. None of the above

2. _____ is/are an individual's self-conception of being male or female based on his or her association with masculine or feminine gender roles.

    1. Gender identity
    2. Gender bias
    3. Sexual orientation
    4. Sexual attitudes

3. Research indicates that individuals are aware of their sexual orientation _____.

    1. At infancy
    2. In early adolescence
    3. In early adulthood
    4. In late adulthood

4. A person who is biologically female but identifies with the male gender and has undergone surgery to alter her body is considered _____.

    1. Transgendered
    2. Transsexual
    3. A cross-dresser
    4. Homosexual

5. Which of following is correct regarding the explanation for transgenderism?

    1. It is strictly biological and associated with chemical imbalances in the brain.
    2. It is a behaviour that is learned through socializing with other transgendered individuals.
    3. It is genetic and usually skips one generation.
    4. Currently, there is no definitive explanation for transgenderism.

12.2. Gender

6. Which of the following is the best example of a gender stereotype?

    1. Women are typically shorter than men.
    2. Men do not live as long as women.
    3. Women tend to be overly emotional, while men tend to be level-headed.
    4. Men hold more high-earning, leadership jobs than women.

7. Which of the following is the best example of the role peers play as an agent of socialization for school-aged children?

1. Children can act however they wish around their peers because children are unaware of gender roles.
2. Peers serve as a support system for children who wish to act outside of their assigned gender roles.
3. Peers tend to reinforce gender roles by criticizing and marginalizing those who behave outside of their assigned roles.
4. None of the above.

8. To which theoretical perspective does the following statement most likely apply: Women continue to assume the responsibility in the household along with a paid occupation because it keeps the household running smoothly (i.e., in a state of balance)?

1. Conflict theory
2. Functionalism
3. Feminist theory
4. Symbolic interactionism

9. Only women are affected by gender stratification.

1. True
2. False

10. According to the symbolic interactionist perspective, we "do gender" _____.

1. During half of our activities
2. Only when it applies to our biological sex
3. Only if we are actively following gender roles
4. All of the time, in everything we do

12.3. Sex and Sexuality

11. What Western country is thought to be the most liberal in its attitudes toward sex?

1. United States
2. Sweden
3. Mexico
4. Ireland

12. Compared to most Western societies, U.S. sexual attitudes are considered _____.

1. Conservative
2. Liberal
3. Permissive
4. Free

13. Sociologists associate sexuality with _____.

1. Heterosexuality
2. Homosexuality
3. Biological factors
4. A person's capacity for sexual feelings

14. Which theoretical perspective stresses the importance of regulating sexual behaviour to ensure marital cohesion and family stability?

1. Functionalism
2. Conflict theory
3. Symbolic interactionalism
4. Queer theory

[Quiz answers at end of chapter]

Short Answer

12.1. The Difference between Sex, Gender, and Sexuality

1. Why do sociologists find it important to differentiate between sex and gender? What importance does the differentiation have in modern society?
2. How is children's play influenced by gender roles? Think back to your childhood. How "gendered" were the toys and activities available to you? Do you remember gender expectations being conveyed through the approval or disapproval of your playtime choices?

12.2. Gender

1. In what way do parents treat sons and daughters differently? How do sons and daughters typically respond to this treatment?
2. What can be done to lessen the effects of gender stratification in the workplace? How does gender stratification harm both men and women?

12.3. Sex and Sexuality

1. Identify three examples of how Canadian society is heteronormative.
2. Consider the types of derogatory labelling that sociologists study and explain how these might apply to discrimination on the basis of sexual orientation.

Further Research

12.1. The Difference between Sex, Gender, and Sexuality

For more information on gender identity and advocacy for transgendered individuals see the Global Action for Trans Equality website: http://openstaxcollege.org/l/trans_equality.

12.2. Gender

For more gender-related statistics, see the U.S. Centers for Disease Control and Prevention website at http://www.cdc.gov/ and browse through to pictures like "gender and education" and "gender and health." (Include quotation marks when searching.)

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Solutions to Section Quiz

1 B, | 2 A, | 3 B, | 4 B, | 5 D, | 6 C, | 7 C, | 8 B, | 9 B, | 10 D, | 11 B, | 12 A, | 13 D, | 14 A, [Return to Quiz]

Image Attributions

Figure 12.3. *Dance to the Berdache* by George Catlin (http://commons.wikimedia.org/wiki/File:Catlin_-_Dance_to_the_berdache.jpg) is in the public domain (http://commons.wikimedia.org/wiki/Public_domain)

Figure 12.8. Pink by Robert Couse Baker (https://www.flickr.com/photos/29233640@N07/3951652557/in/gallery-42031937@N04-72157623838686839/) used under CC BY 2.0 license (https://creativecommons.org/licenses/by/2.0/)

Figure 12.9. Emily Murphy. [Public domain], via Wikimedia Commons (https://commons.wikimedia.org/wiki/File:EmilyMurphy.jpg)

Figure 12.12. Two men in Florence kissing. Bartolomeo Cesi, [Public domain], via Wikimedia Commons (https://commons.wikimedia.org/wiki/File:Twoflorencemenkiss.jpg)

11

Chapter 14. Marriage and Family



Figure 14.1. With so many unmarried couples living together and having children, is marriage becoming obsolete? (Photo courtesy of Nina Matthews/flickr)

Learning Objectives

14.1. What Is Marriage? What Is a Family?

- Define "the family".
- Describe micro, meso, and macro approaches to the family.
- Outline the sociological approach to the dynamics of attraction and love.
- Analyze changes in marriage and family patterns.
- Understand the effect of the family life cycle on the quality of family experience.

14.2. Variations in Family Life

- Recognize variations in family life.
- Describe the different forms of the family including the nuclear family, single-parent families, cohabitation, same-sex couples, and unmarried individuals.
- Discuss the functionalist, critical, and symbolic interactionist perspectives on the modern family.

14.3. Challenges Families Face

- Understand the social and interpersonal impact of divorce.
- Describe the problems of family abuse and discuss whether corporal punishment is a form of abuse.

Christina and James met in college and have been dating for more than five years. For the past two years, they have been living together in a condo they purchased jointly. While Christina and James were confident in their decision to enter into a commitment (such as a 20-year mortgage), they are unsure if they want to enter into *marriage*. The couple had many discussions about marriage and decided that it just did not seem necessary. Was it not only a piece of paper? Did not half of all marriages end in divorce?

Neither Christina nor James had seen much success with marriage while growing up. Christina was raised by a single mother. Her parents never married, and her father has had little contact with the family since she was a toddler. Christina and her mother lived with her maternal grandmother, who often served as a surrogate parent. James grew up in a two-parent household until age seven, when his parents divorced. He lived with his mother for a few years, and then later with his mother and her boyfriend until he left for college. James remained close with his father who remarried and had a baby with his new wife.

Recently, Christina and James have been thinking about having children and the subject of marriage has resurfaced. Christina likes the idea of her children growing up in a traditional family, while James is concerned about possible marital problems down the road and negative consequences for the children should that occur. When they shared these concerns with their parents, James's mom was adamant that the couple should get married. Despite having been divorced and having a live-in boyfriend of 15 years, she believes that children are better off when their parents are married. Christina's mom believes that the couple should do whatever they want but adds that it would "be nice" if they wed. Christina and James's friends told them, married or not married, they would still be a family.

Christina and James's scenario may be complicated, but it is representative of the lives of many young couples today, particularly those in urban areas (Useem, 2007). Statistics Canada (2012) reports that the number of unmarried, common-law couples grew by 35% between 2001 and 2011, to make up a total of 16.7% of all families in Canada. Cohabitating, but unwed, couples account for 16.7% of all families in Canada. Some may never choose to wed (Jayson, 2008). With fewer couples marrying, the traditional Canadian family structure is becoming less common. Nevertheless, although the percentage of traditional married couples has declined as a proportion of all families, at 67% of all families, it is still by far the predominant family structure.

14.1. What Is Marriage? What Is a Family?



Figure 14.2. The modern concept of family is far more encompassing than in past decades. What do you think constitutes a family? (Photo (a) courtesy of Gareth Williams/flickr; photo (b) courtesy of Guillaume Paumier/ Wikimedia Commons)

Marriage and family are key structures in most societies. While the two institutions have historically been closely linked in Canadian culture, their connection is becoming more complex. The relationship between marriage and family is often taken for granted in the popular imagination but with the increasing diversity of family forms in the 21st century their relationship needs to be reexamined.

What is marriage? Different people define it in different ways. Not even sociologists are able to agree on a single meaning. For our purposes, we will define **marriage** as a legally recognized social contract between two people, traditionally based on a sexual relationship, and implying a permanence of the union. In creating an inclusive definition, we should also consider variations, such as whether a formal legal union is required (think of common-law marriage and its equivalents), or whether more than two people can be involved (consider polygamy). Other variations on the definition of marriage might include whether spouses are of opposite sexes or the same sex, and how one of the traditional expectations of marriage (to produce children) is understood today.

Sociologists are interested in the relationship between the institution of marriage and the institution of family because, historically, marriages are what create a family, and families are the most basic social unit upon which society is built. Both marriage and family create status roles that are sanctioned by society.

So what is a family? A husband, a wife, and two children — maybe even a pet — served as the model for the traditional Canadian family for most of the 20th century. But what about families that deviate from this model, such as a single-parent household or a homosexual couple without children? Should they be considered families as well?

The question of what constitutes a family is a prime area of debate in family sociology, as well as in politics and religion. Social conservatives tend to define the family in terms of a "traditional" nuclear family structure with each family member filling a certain role (like father, mother, or child). Sociologists, on the other hand, tend to define family more in terms of the manner in which members relate to one another than on a strict configuration of status roles. Here, we will define **family** as a socially recognized group joined by blood relations, marriage, or adoption, that forms an emotional connection and serves as an economic unit of society. Sociologists also identify different types of families based on how one enters into them. A **family of orientation** refers to the family into which a person is born. A **family of procreation** describes one that is formed through marriage. These distinctions have cultural significance related to issues of lineage (the difference between patrilineal and matrilineal descent for example).

Based on Simmel's distinction between the *form* and *content* of social interaction (see Chapter 6), we can analyze the family as a *social form* that comes into existence around five different *contents* or interests: sexual activity, economic cooperation, reproduction, socialization of children, and emotional support. As we might expect from Simmel's analysis, the types of family form in which all or some of these contents are expressed are diverse: nuclear families, polygamous families, extended families, same-sex parent families, single-parent families, blended families, and zero-child families, etc. However, the forms that families take are not random; rather, these forms are determined by cultural traditions, social structures, economic pressures, and historical transformations. They also are subject to intense moral and political debate about the definition of the family, the "decline of the family," or the policy options to best support the well-being of children. In these debates, sociology demonstrates its practical side as a discipline that is capable of providing the factual knowledge needed to make evidence-based decisions on political and moral issues concerning the family.

The Macro, Meso and Micro Family

The family is an excellent example of an institution that can be examined at the micro-, meso-, and macro- levels of analysis. For example, the debate between functionalist and critical sociologists on the rise of non-nuclear family forms is a macro-level debate. It focuses on the family in relationship to a society as a whole. Since the 1950s, the functionalist approach to the family has emphasized the importance of the **nuclear family** — a cohabiting man and woman who maintain a socially approved sexual relationship and have at least one child — as the basic unit of an orderly and functional society. Although only 39% of families conformed to this model in 2006, in functionalist approaches, it often operates as a model of the normal family, with the implication that non-normal family forms lead to a variety of society-wide dysfunctions such as crime, drug use, poverty, and welfare dependency .

On the other hand, critical perspectives emphasize the inequalities and power relations within the family and their relationship to inequality in the wider society. The contemporary diversity of family forms does not indicate the "decline of the family" (i.e., of the ideal of the nuclear family) but the diverse responses of the family form to the tensions of gender inequality and historical changes in the economy and society. The typically large, extended family of the rural, agriculture-based economy 100 years ago in Canada was very different from the single breadwinner-led "nuclear" family of the Fordist economy following World War II; it is different again from today's families who have to respond to economic conditions of precarious employment, fluid modernity, and norms of gender and sexual equality. In the critical perspective, the nuclear

family should be thought of less as a normative model for how families should be and more as an historical anomaly that reflected the specific social and economic conditions of the two decades following the Second World War. These are analyses that set out to understand the family within the context of macro-level processes or society as a whole.

At the meso-level, the sociology of mate selection and marital satisfaction reveal the various ways in which the dynamics of the group, or the family form itself, act upon the desire, preferences, and choices of individual actors. At the meso-level, sociologists are concerned with the interactions within groups where multiple social roles interact simultaneously. Since the spontaneity of romantic love and notions of individual "chemistry" have become so central to our concepts of mate selection in Western societies, it is interesting to note the social and group influences that impinge on what otherwise seems a purely individual choice: the appraisal of socially defined "assets" in potential mates, in-group/out-group dynamics in mate preference, and demographic variables that affect the availability of desirable mates (see discussion below).

Similarly, it is possible to speak of the life cycle of marriages independently of the specific individuals involved. This area of study is another meso-level analysis. Marital dissatisfaction and divorce peak in the 5th year of marriage and again between the 15th and 20th years of marriage. The presence or absence of children in the home also affects marital satisfaction — nonparents and parents whose children have left home have the highest level of marital satisfaction. Thus, the family form itself appears to have built-in qualities or dynamics regardless of the personalities or specific qualities of family members.

At the micro-level of analysis, sociologists focus on the dynamics between individuals within families. One example, of which probably every married couple is acutely aware, is the interactive dynamic described by **exchange theory**. Exchange theory proposes that all relationships are based on giving and returning valued "goods" or "services." Individuals seek to maximize their rewards in their exchanges with others. How do they weigh up who is contributing more, and who is contributing less, of the valuable resources that sustain the marriage relationship (such as money, time, chores, emotional support, romantic gestures, quality time, etc.)? What happens to the family dynamic when one spouse is a net debtor and another a net creditor in the exchange relationship? In *The Unbearable Lightness of Being*, the Czech novelist Milan Kundera describes the way every relationship forges an implicit contract regarding these exchanges within the first 6 weeks. It is as if a template has been established that will govern the nature of the conflicts, tensions, and disagreements between a married couple for the duration of their relationship. Kundera is writing fiction, but the dynamic he describes exemplifies a micro-level analysis in that this "contract" is a form created through the interaction between specific individuals. Afterwards, it acts as a structure that constrains their interaction. In the more severe cases of unequal exchange, domestic violence, whether physical or emotional, can be the result. The dynamics of "intimate terrorism" and "violent resistance" describe the extreme outcomes of unequal exchange.

Making Connections: Sociology in the Real World

How Do Working Moms Impact Society?

What constitutes a "typical family" in Canada has changed tremendously over the past decades. One of the most notable changes has been the increasing number of mothers who work outside the home. Earlier in Canadian society, most family households consisted of one parent working outside the home and the other being the primary child care provider. Because of traditional gender roles and family structures, this was typically a working father and a stay-at-home mom. Research shows that in 1951 only 24% of all women worked outside the home (Li, 1996). In 2009, 58.3% of all women did, and 64.4% of women with children younger than three years of age were employed (Statistics Canada, 2011).

Sociologists interested in this topic might approach its study from a variety of angles. One might be interested in its impact on a child's development; another sociologist may explore its effect on family income; while a third sociologist might examine how other social institutions have responded to this shift in society. A sociologist studying the impact of working mothers on a child's development might ask questions about children raised in child care settings outside the home. How is a child socialized differently when raised largely by a child care provider rather than a parent? Do early experiences in a school-like child care setting lead to improved academic performance later in life? How does a child with two working parents perceive gender roles compared to a child raised with a stay-at-home parent? Another



Figure 14.3. Working mother at the end of a day. (Image courtesy of Thanh Mai Bui Duy/Flickr)

sociologist might be interested in the increase in working mothers from an economic perspective. Why do so many households today have dual incomes? Has this changed the income of families substantially? How do women's dual roles in the household and in the wider economy affect their occupational achievements and ability to participate on an equal basis with men in the workforce? What impact does the larger economy play in the economic conditions of an individual household? Do people view money — savings, spending, debt — differently than they have in the past?

Curiosity about this trend's influence on social institutions might lead a researcher to explore its effect on the nation's educational and child care systems. Has the increase in working mothers shifted traditional family responsibilities onto schools, such as providing lunch and even breakfast for students? How does the creation of after-school care programs shift resources away from traditional school programs? What would the effect be of providing a universal, subsidized child care program on the ability of women to pursue uninterrupted careers?

As these examples show, sociologists study many real-world topics. Their research often influences social policies and political issues. Results from sociological studies on this topic might play a role in developing federal policies like the Employment Insurance maternity and parental benefits program, or they might bolster the efforts of an advocacy group striving to reduce social stigmas placed on stay-at-home dads, or they might help governments determine how to best allocate funding for education. Many European countries like Sweden have substantial family support policies, such as a full year of parental leave at 80% of wages when a child is born, and heavily subsidized, high-quality daycare and preschool programs. In Canada, a national subsidized daycare program existed briefly in 2005 but was scrapped in 2006 by the Conservative government and replaced with a $100-a-month direct payment to parents for each child. Sociologists might be interested in studying whether the benefits of the Swedish system — in terms of children's well-being, lower family poverty, and gender equality — outweigh the drawbacks of higher Swedish tax rates.

What is love (for a sociologist)?

Throughout most of history, erotic love or romantic love was not considered a suitable basis for marriage. Marriages were typically arranged by families through negotiations designed to increase wealth, property, or prestige, establish ties, or gain political advantages. In modern individualistic societies on the other hand, romantic love is seen as the essential basis for marriage. In response to the question, "If a man (woman) had all the other qualities you desired, would you marry this person if you were not in love with him (her)?" only 4% of Americans and Brazilians, 5% of Australians, 6% of Hong Kong residents, and 7% of British residents said they would — compared to 49% of Indians and 50% of Pakistanis (Levine,



Figure 14.4. "Psyche Revived by Cupid's Kiss," Antonio Canova (1777). In the Greek myth of Cupid and Psyche, Psyche is suddenly struck by passion when she accidentally wounds herself on one of Cupid's arrows. (Image courtesy of Riccardo Cuppini/ Flickr)

Sato, Hashimoto, and Verma, 1995). Despite the emphasis on romantic love, it is also recognized to be an unstable basis for long-term relationships as the feelings associated with it are transitory.

What exactly is romantic love? Neuroscience describes it as one of the central brain systems that have evolved to ensure mating, reproduction, and the perpetuation of the species (Fisher, 1992). Alongside the instinctual drive for sexual satisfaction, (which is relatively indiscriminate in its choice of object), and companionate love, (the long term attachment to another which enables mates to remain together at least long enough to raise a child through infancy), romantic love is the intense attraction to a particular person that focuses "mating energy" on a single person at a single time. It manifests as a seemingly involuntary, passionate longing for another person in which individuals experience obsessiveness, craving, loss of appetite, possessiveness, anxiety, and compulsive, intrusive thoughts. In studies comparing functional MRI brain scans of maternal attachment to children and romantic attachment to a loved one, both types of attachment activate oxytocin and vasopressin receptors in regions in the brain's reward system while suppressing regions associated with negative emotions and critical judgement of others (Bartels and Zeki, 2004; Acevedo, Aron, Fisher and Brown, 2012). In this respect, romantic love shares many physiological features in common with addiction and addictive behaviours.

In a sociological context, the physiological manifestations of romantic love are associated with a number of social factors. Love itself might be described as the general force of attraction that draws people together; a principle agency that enables society to exist. As Freud defined it, love in the form of *eros*, was the force that strove to "form living substance into ever greater unities, so that life may be prolonged and brought to higher development" (Freud cited in Marcuse, 1955). In this sense, as Erich Fromm put it, "[l]ove is not primarily a relationship to a specific person; it is an attitude, an orientation of character which determines the relatedness of a person to the world as a whole, not toward one "object" of love" (Fromm, 1956). Fromm argues therefore that love can take many forms: brotherly love, the sense of care for another human; motherly love, the unconditional love of a mother for a child; erotic love, the desire for complete fusion with another person; self-love, the ability to affirm and accept oneself; and love of God, a sense of universal belonging or union with a higher or sacred order.

Only when the object of love is individualized in another, does it come to form the basis of erotic or intimate relationships. In this sense, **romantic love** can be defined as the desire for emotional union with another person (Fisher, 1992). In Robert Sternberg's (1986) **triangular theory of love**, romantic love consists of three components: *passion* or erotic attraction (limerance); *intimacy* or feelings of bonding, sharing, closeness, and connectedness; and *commitment* or deliberate choice to enter into and remain in a relationship. The three components vary independently in long term relationships: passion starts off at high levels but drops off as the partner no longer has the same arousal value, intimacy decreases gradually as the relationship becomes more predictable, while commitment increases gradually at first, then more rapidly as the relationship intensifies, and eventually levels off. This suggests that for couples who remain together,

romantic love eventually develops into **companionate love** characterized by deep friendship, comfortable companionship, and shared interests, but not necessarily intense attraction or sexual desire.

Although romantic love is often characterized as an involuntary force that sweeps people away, mate selection nevertheless involves an implicit or explicit cost/benefit analysis that affects who falls in love with whom. In particular, people tend to select mates of a similar social status from within their own social group. The selection process is influenced by three sociological variables (Kalmijn, 1998). Firstly, potential mates assess each others' *socioeconomic resources*, like income potential or family wealth, and *cultural resources*, like education, taste, worldview, and values, to maximize the value or rewards the relationship will bring to them. Secondly, third parties like family, church, or community members tend intervene to prevent people from choosing partners from outside their community or social group because this threatens group cohesion and homogeneity. Thirdly, demographic variables that effect "local marriage markets" — typically places like schools, workplaces, bars, clubs, and neighborhoods where potential mates can meet — will also affect mate choice. Due to probability, people from large or concentrated social groups have more chance to choose a partner from within their group than do people from smaller or more dispersed groups. Other demographic or social factors like war or economic conditions also affect the ratio of males to females or the distribution of ages in a community, which in turn affects the likelihood of finding a mate inside of one's social group. Mate selection is therefore not as random as the story of Cupid's arrow suggests.

Perceptions of the family

Symbolic interactionist theories indicate that families are groups in which participants view themselves as family members and act accordingly. In other words, families are groups in which people come together to form a strong primary group connection, maintaining emotional ties to one another over a long period of time. Such families could potentially include groups of close friends as family. However, the way family groupings view themselves is not independent of the wider social forces and current debates in society at large.

North Americans are somewhat divided when it comes to determining what does and what does not constitute a family. In a 2010 survey conducted by Ipsos Reid, participants were asked what they believed constituted a family unit. 80% of respondents agreed that a husband, wife, and children constitute a family. 66% stated that a common-law couple with children still constitutes a family. The numbers drop for less traditional structures: a single mother and children (55%), a single father and children (54%), grandparents raising children (50%), common-law or married couples without children (46%), gay male couples with children (45%) (Postmedia News, 2010). This survey revealed that children tend to be the key indicator in establishing "family" status: the percentage of individuals who agreed that unmarried couples constitute a family nearly doubled when children were added.

Another study also revealed that 60% of North Americans agreed that if you consider yourself a family, you are a family (a concept that reinforces an interactionist perspective) (Powell et al., 2010). Canadian statistics are based on the more inclusive definition of "census families." Statistics Canada defines a census family as "composed of a married or common-law couple, with or without children, or of a lone parent living with at least one child in the same dwelling. Couples can be of the opposite sex or of the same sex" (Statistics Canada, 2012). Census categories aside, sociologists would argue that the general concept of family is more diverse and less structured than in years past. Society has given more leeway to the design of a family — making room for what works for its members (Jayson, 2010).

Family is, indeed, a subjective concept, but it is a fairly objective fact that family (whatever one's concept of it may be) is very important to North Americans. In a 2010 survey by Pew Research Center in Washington, D.C., 76% of adults surveyed stated that family is "the most important" element of their life — just 1% said it was "not important" (Pew Research Center, 2010). It is also very important to society. American President Ronald Reagan notably stated, "The family has always been the cornerstone of American society. Our families nurture, preserve, and pass on to each succeeding generation the values we share and cherish, values that are the foundation of our freedoms" (Lee, 2009). The dark side of this importance can also be seen in Reagan's successful use of "family values" rhetoric to attack welfare mothers. His infamous "welfare queen" story about a Black single mother in Chicago, who supposedly defrauded the government of $150,000 in welfare payments, was a complete fabrication that nevertheless "worked" politically because of widespread social anxieties about the decline of the family. While the design of the family may have changed in recent years, the fundamentals of emotional closeness and support are still present. Most respondents to the Pew survey stated that their

family today is at least as close (45%) or closer (40%) than the family with which they grew up (Pew Research Center, 2010).

Alongside the debate surrounding what constitutes a family is the question of what North Americans believe constitutes a marriage. Many religious and social conservatives believe that marriage can only exist between man and a woman, citing religious scripture and the basics of human reproduction as support. As Prime Minister Stephen Harper put it, "I have no difficulty with the recognition of civil unions for nontraditional relationships but I believe in law we should protect the traditional definition of marriage" (*Globe and Mail,* 2010). Social liberals and progressives, on the other hand, believe that marriage can exist between two consenting adults — be they a man and a woman, a woman and a woman, or a man and a man — and that it would be discriminatory to deny such a couple the civil, social, and economic benefits of marriage.

Marriage Patterns

With single parenting and **cohabitation** (when a couple shares a residence but not a marriage) becoming more acceptable in recent years, people may be less motivated to get married. In a recent survey, 39% of respondents answered "yes" when asked whether marriage is becoming obsolete (Pew Research Center, 2010). The institution of marriage is likely to continue, but some previous patterns of marriage will become outdated as new patterns emerge. In this context, cohabitation contributes to the phenomenon of people getting married for the first time at a later age than was typical in earlier generations (Glezer, 1991). Furthermore, marriage will continue to be delayed as more people place education and career ahead of "settling down."

One Partner or Many?

North Americans typically equate marriage with **monogamy**, when someone is married to only one person at a time. In many countries and cultures around the world, however, having one spouse is not the only form of marriage. In a majority of cultures (78%), **polygamy**, or being married to more than one person at a time, is accepted (Murdock, 1967), with most polygamous societies existing in northern Africa and East Asia (Altman and Ginat, 1996). Instances of polygamy are almost exclusively in the form of polygyny. **Polygyny** refers to a man being married to more than one woman at the same time. The reverse, when a woman is married to more than one man at the same time, is called **polyandry**. It is far less common and only occurs in about 1% of the world's cultures (Altman and Ginat, 1996). The reasons for the overwhelming prevalence of polygamous societies are varied but they often include issues of population growth, religious ideologies, and social status.

While the majority of societies accept polygyny, the majority of people do not practise it. Often fewer than 10% (and no more than 25 to 35%) of men in polygamous cultures have more than one wife; these husbands are often older, wealthy, high-status men (Altman and Ginat, 1996). The average plural marriage involves no more than three wives. Negev Bedouin men in Israel, for example, typically have two wives, although it is acceptable to have up to four (Griver, 2008). As urbanization increases in these cultures, polygamy is likely to decrease as a result of greater access to mass media, technology, and education (Altman and Ginat, 1996).

In Canada, polygamy is considered by most to be socially unacceptable and it is illegal. The act of entering into marriage while still married to another person is referred to as **bigamy** and is prohibited by Section 290 of the Criminal Code of Canada (Minister of Justice, 2014). Polygamy in Canada is often associated with those of the Mormon faith, although in 1890 the Mormon Church officially renounced polygamy. Fundamentalist Mormons, such as those in the Fundamentalist Church of Jesus Christ of Latter Day Saints (FLDS), on the other hand, still hold tightly to the historic Mormon beliefs and practices and allow polygamy in their sect.

The prevalence of polygamy among Mormons is often overestimated due to sensational media stories such as the prosecution of polygamous sect leaders in Bountiful, B.C., theYearning for Zion ranch raid in Texas in 2008, and popular television shows such as HBO's *Big Love* and TLC's *Sister Wives*. It is estimated that there are about 37,500 fundamentalist Mormons involved in polygamy in the United States, Canada, and Mexico, but that number has shown a steady decrease in the last 100 years (Useem, 2007).

North American Muslims, however, are an emerging group with an estimated 20,000 practicing polygamy. Again, polygamy among North American Muslims is uncommon and occurs only in approximately 1% of the population (Useem, 2007). For now, polygamy among North American Muslims has gone fairly unnoticed by mainstream society, but like

fundamentalist Mormons whose practices were off the public's radar for decades, they may someday find themselves at the centre of social debate.



Figure 14.5. Polygamy has a Judeo-Christian tradition, as exemplified by King Solomon, who was thought to have had more than 700 wives. (Photo courtesy of public domain/Wikimedia Commons)

Residency and Lines of Descent

When considering their lineage, most Canadians look to both their father's and mother's sides. Both paternal and maternal ancestors are considered part of one's family. This pattern of tracing kinship is called **bilateral descent**. Note that **kinship**, or one's traceable ancestry, can be based on blood, marriage, or adoption. 60% of societies, mostly modernized nations, follow a bilateral descent pattern. **Unilateral descent** (the tracing of kinship through one parent only) is practised in the other 40% of the world's societies, with high concentration in pastoral cultures (O'Neal, 2006).

There are three types of unilateral descent: **patrilineal**, which follows the father's line only; **matrilineal**, which follows the mother's side only; and **ambilineal**, which follows either the father's only or the mother's side only, depending on the situation. In partrilineal societies, such as those in rural China and India, only males carry on the family surname. This gives males the prestige of permanent family membership while females are seen as only temporary members (Harrell, 2001). North American society assumes some aspects of partrilineal decent. For instance, most children assume their father's last name even if the mother retains her birth name.

In matrilineal societies, inheritance and family ties are traced to women. **Matrilineal descent** is common in Native American societies, notably the Crow and Cherokee tribes. In these societies, children are seen as belonging to the women and, therefore, one's kinship is traced to one's mother, grandmother, great grandmother, and so on (Mails, 1996). In ambilineal societies, which are most common in Southeast Asian countries, parents may choose to associate their children with the kinship of either the mother or the father. This choice may be based on the desire to follow stronger or more prestigious kinship lines or on cultural customs, such as men following their father's side and women following their mother's side (Lambert, 2009).

Tracing one's line of descent to one parent rather than the other can be relevant to the issue of residence. In many cultures, newly married couples move in with, or near to, family members. In a **patrilocal residence** system it is customary

for the wife to live with (or near) her husband's blood relatives (or family of orientation). Patrilocal systems can be traced back thousands of years. In a DNA analysis of 4,600-year-old bones found in Germany, scientists found indicators of patrilocal living arrangements (Haak et al. 2008). Patrilocal residence is thought to be disadvantageous to women because it makes them outsiders in the home and community; it also keeps them disconnected from their own blood relatives. In China, where patrilocal and patrilineal customs are common, the written symbols for maternal grandmother (*wáipá*) are separately translated to mean "outsider" and "women" (Cohen, 2011).

Similarly, in **matrilocal residence** systems, where it is customary for the husband to live with his wife's blood relatives (or her family of orientation), the husband can feel disconnected and can be labelled as an outsider. The Minangkabau people, a matrilocal society that is indigenous to the highlands of West Sumatra in Indonesia, believe that home is the place of women and they give men little power in issues relating to the home or family (Joseph and Najmabadi, 2003). Most societies that use patrilocal and patrilineal systems are patriarchal, but very few societies that use matrilocal and matrilineal systems are matriarchal, as family life is often considered an important part of the culture for women, regardless of their power relative to men.

Stages of Family Life

As we have established, the concept of family has changed greatly in recent decades. Historically, it was often thought that most (certainly many) families evolved through a series of predictable stages. Developmental or "stage" theories used to play a prominent role in family sociology (Strong and DeVault, 1992). Today, however, these models have been criticized for their linear and conventional assumptions as well as for their failure to capture the diversity of family forms. While reviewing some of these once-popular theories, it is important to identify their strengths and weaknesses.

The set of predictable steps and patterns families experience over time is referred to as the **family life cycle**. One of the first designs of the family life cycle was developed by Paul Glick in 1955. In Glick's original design, he asserted that most people will grow up, establish families, rear and launch their children, experience an "empty nest" period, and come to the end of their lives. This cycle will then continue with each subsequent generation (Glick, 1989). Glick's colleague, Evelyn Duvall, elaborated on the family life cycle by developing these classic stages of family (Strong and DeVault, 1992):

Table 14.1. Stage Theory. This table shows one example of how a "stage" theory might categorize the phases a family goes through.

Stage	Family Type	Children
1	Marriage Family	Childless
2	Procreation Family	Children ages 0 to 2.5
3	Preschooler Family	Children ages 2.5 to 6
4	School-age Family	Children ages 6–13
5	Teenage Family	Children ages 13–20
6	Launching Family	Children begin to leave home
7	Empty Nest Family	"Empty nest"; adult children have left home

The family life cycle was used to explain the different processes that occur in families over time. Sociologists view each stage as having its own structure with different challenges, achievements, and accomplishments that transition the family from one stage to the next. The problems and challenges that a family experiences in Stage 1 as a married couple with no children are likely very different than those experienced in Stage 5 as a married couple with teenagers. Marital satisfaction of husbands and wives, for example, tends to be high at the beginning of the marriage and remain so into the procreation stage (children ages 0-2.5), falls as children age and reaches its lowest point when the children are teenagers, and then increases again when the children reach adulthood and leave home (Lupri and Frideres, 1981). The most maritally satisfied couples are those who do not have children and those whose children have left home ("empty nesters"), which is ironic considering people often get married to have children (Murphy and Staples, 1979). Some interpret this pattern as meaning simply that between couples "illusions disappear and disenchantment ensues," whereas the developmental approach of family stages suggests "that meanings couples attached to their relationship and their roles change over time and thus affect

marital satisfaction" (Lupri and Frideres, 1981). The success of a family can be measured by how well they adapt to these challenges and transition into each stage.

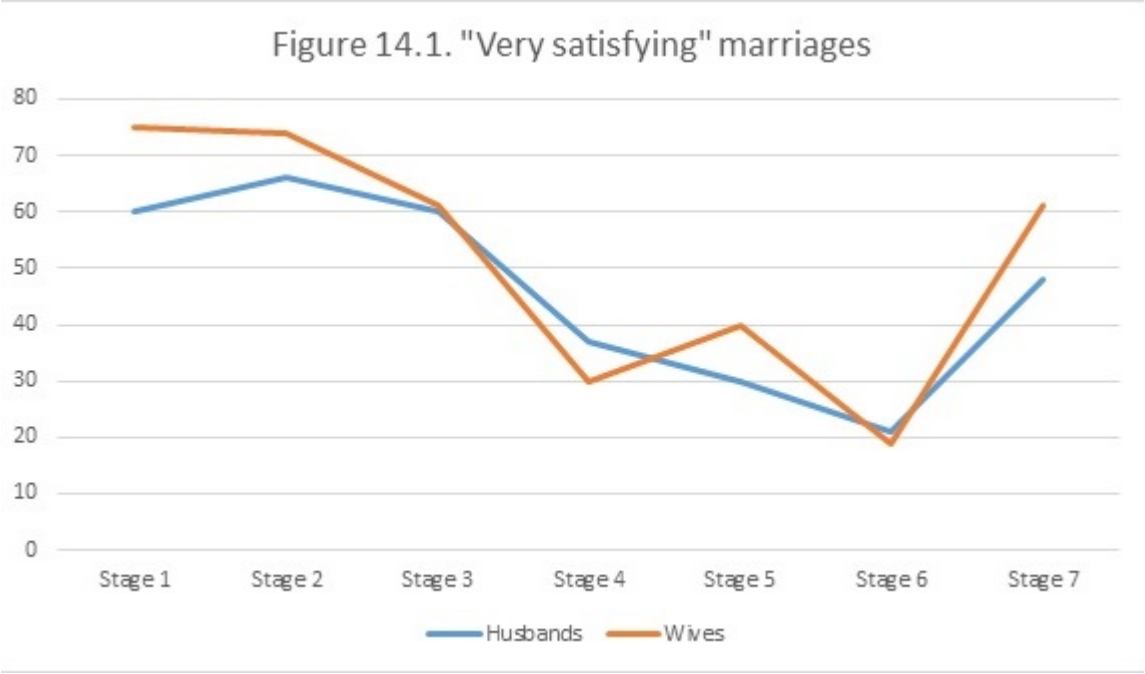


Figure 14.6. Percentages of husbands and wives in each of seven stages of the family life cycle reporting "very satisfying" marriages. [Long Description] (Based on Lupri and Frideres, 1981.)

As early "stage" theories have been criticized for generalizing family life and not accounting for differences in gender, ethnicity, culture, and lifestyle, less rigid models of the family life cycle have been developed. One example is the **family life course**, which recognizes the events that occur in the lives of families but views them as parting terms of a fluid course rather than in consecutive stages (Strong and DeVault, 1992). This type of model accounts for changes in family development, such as the fact that today, childbearing does not always occur with marriage. It also sheds light on other shifts in the way family life is practised. Society's modern understanding of family rejects rigid "stage" theories and is more accepting of new, fluid models. In fact contemporary family life has not escaped the phenomenon that Zygmunt Bauman calls **fluid** (or **liquid**) **modernity**, a condition of constant mobility and change in relationships (2000).

Making Connections: Sociology in the Real World

The Evolution of Television Families

Whether you grew up watching the Cleavers, the Waltons, the Huxtables, or the Simpsons, most of the iconic families you saw in television sitcoms included a father, a mother, and children cavorting under the same roof while comedy ensued. The 1960s was the height of the suburban American nuclear family on television with shows such as *The Donna Reed Show* and *Father Knows Best*. While some shows of this era portrayed single parents (*My Three Sons* and *Bonanza*, for instance), the single status almost always resulted from being widowed, not divorced or unwed.

Although family dynamics in real North American homes were changing, the expectations for families portrayed on television were not. North America's first reality show, *An American Family* (which aired on PBS in 1973) chronicled Bill and Pat Loud and their children as a "typical" American family. Cameras documented the typical coming and going of daily family life in true cinéma-vérité style. During the series, the oldest son, Lance, announced to the family that he was gay, and at the series' conclusion, Bill and Pat decided to divorce. Although the Loud's union was among



Figure 14.7. Family photo of the Louds, who were the subject of a 12-part television documentary, An American Family, that aired on PBS stations in 1973. (Image courtesy of Wikimedia Commons)

the 30% of marriages that ended in divorce in 1973, the family was featured on the cover of the March 12 issue of *Newsweek* with the title "The Broken Family" (Ruoff, 2002).

Less traditional family structures in sitcoms gained popularity in the 1980s with shows such as *Diff'rent Strokes* (a widowed man with two adopted African American sons) and *One Day at a Time* (a divorced woman with two teenage daughters). Still, traditional families such as those in *Family Ties* and *The Cosby Show* dominated the ratings. The late 1980s and the 1990s saw the introduction of the dysfunctional family. Shows such as *Roseanne*, *Married with Children*, and *The Simpsons* portrayed traditional nuclear families, but in a much less flattering light than those from the 1960s did (Museum of Broadcast Communications, 2011).

Over the past 10 years, the nontraditional family has become somewhat of a tradition in television. While most situation comedies focus on single men and women without children, those that do portray families often stray from the classic structure: they include unmarried and divorced parents, adopted children, gay couples, and multigenerational households. Even those that do feature traditional family structures may show less traditional characters in supporting roles, such as the brothers in the highly rated shows *Everybody Loves Raymond* and *Two and Half Men*. Even wildly popular children's programs as Disney's *Hannah Montana* and *The Suite Life of Zack & Cody* feature single parents.

In 2009, ABC premiered an intensely nontraditional family with the broadcast of *Modern Family*. The show follows an extended family that includes a divorced and remarried father with one stepchild, and his biological adult children — one of who is in a traditional two-parent household, and the other who is a gay man in a committed relationship raising an adopted daughter. While this dynamic may be more complicated than the typical "modern" family, its elements may resonate with many of today's viewers. "The families on the shows aren't as idealistic, but they remain relatable," states television critic Maureen Ryan. "The most successful shows, comedies especially, have families that you can look at and see parts of your family in them" (Respers France, 2010).

14.2. Variations in Family Life

The combination of husband, wife, and children that 80% of Canadians believes constitutes a family is not representative of the majority of Canadian families. According to 2011 census data, only 31.9% of all census families consisted of a married

couple with children, down from 37.4% in 2001. 63% of children under age 14 live in a household with two married parents. This is a decrease from almost 70% in 1981 (Statistics Canada, 2012). As we noted above, this two-parent family structure is known as a *nuclear family*, referring to married parents and children as the nucleus, or core, of the group. Recent years have seen a rise in variations of the nuclear family with the parents not being married. The proportion of children aged 14 and under who live with two unmarried cohabiting parents increased from 12.8% in 2001 to 16.3% in 2011 (Statistics Canada, 2012).



Figure 14.8. One in five Canadian children live in a single-parent household. (Photo courtesy of Ross Griff/flickr)

Single Parents

Single-parent households are also on the rise. In 2011, 19.3% of children aged 14 and under lived with a single parent only, up slightly from 18% in 2001. Of that 19.3% , 82% live with their mother (Statistics Canada, 2012).

Stepparents are an additional family element in two-parent homes. A stepfamily is defined as "a couple family in which at least one child is the biological or adopted child of only one married spouse or common-law partner and whose birth or adoption preceded the current relationship" (Statistics Canada, 2012). Among children living in two parent households, 10% live with a biological or adoptive parent and a stepparent (Statistics Canada, 2012).

In some family structures a parent is not present at all. In 2010, 106,000 children (1.8% of all children) lived with a guardian who was neither their biological nor adoptive parent. Of these children, 28% lived with grandparents, 44% lived with other relatives, and 28% lived with non-relatives or foster parents. If we also include families in which both parents and grandparents are present (about 4.8% of all census families with children under the age of 14 years), this family structure is referred to as the **extended family**, and may include aunts, uncles, and cousins living in the same home. Foster children account for about 0.5% of all children in private households.

In the United States, the practice of grandparents acting as parents, whether alone or in combination with the child's parent, is becoming more common (about 9%) among American families (De Toledo and Brown, 1995). A grandparent functioning as the primary care provider often results from parental drug abuse, incarceration, or abandonment. Events like these can render the parent incapable of caring for his or her child. However, in Canada, census evidence indicates that the percentage of children in these "skip-generation" families remained more or less unchanged between 2001 and 2011 at 0.5% (Statistics Canada, 2012).

Changes in the traditional family structure raise questions about how such societal shifts affect children. Research, mostly from American sources, has shown that children living in homes with both parents grow up with more financial and

educational advantages than children who are raised in single-parent homes (U.S. Census Bureau, 2010). The Canadian data is not so clear. It is true that children growing up in single-parent families experience a lower economic standard of living than families with two parents. In 2008, female lone-parent households earned an average of $42,300 per year, male lone-parent households earned $60,400 per year, and two-parent families earned $100,200 per year (Williams, 2010). However, in the lowest 20% of families with children aged four to five years old, single-parent families made up 48.9% of households while intact or blended households made up 51.1% (based on 1998/99 data). Single-parent families do not make up a larger percentage of low-income families (Human Resources Development Canada, 2003). Moreover, both the income (Williams, 2010) and the educational attainment (Human Resources Development Canada, 2003) of single mothers in Canada has been increasing, which in turn is linked to higher levels of life satisfaction.

In research published from the National Longitudinal Survey of Children and Youth (a long-term study initiated in 1994 that is following the development of a large cohort of children from birth to the age of 25), the evidence is ambiguous as to whether having single or dual parents has a significant effect on child development outcomes. For example, indicators of vocabulary ability of children aged four to five years old did not differ significantly between single- and dual-parent families. However, aggressive behaviour (reported by parents) in both girls and boys aged four to five years old was greater in single-parent families (Human Resources Development Canada, 2003). In fact, significant markers of poor developmental attainment were more related to the sex of the child (more pronounced in boys), maternal depression, low maternal education, maternal immigrant status, and low family income (To, et al., 2004). We will have to wait for more research to be published from the latest cycle of the National Longitudinal Survey to see whether there is more conclusive evidence concerning the relative advantages of dual- and single-parent family settings.

Nevertheless, what the data show is that the key factors in children's quality of life are the educational levels and economic condition of the family, not whether children's parents are married, common-law, or single. For example, young children in low-income families are more likely to have vocabulary problems, and young children in higher-income families have more opportunities to participate in recreational activities (Human Resources Development Canada, 2003). This is a matter related more to public policy decisions concerning the level of financial support and care services (like public child care) provided to families than different family structures per se. In Sweden, where the government provides generous paid parental leave after the birth of a child, free health care, temporary paid parental leave for parents with sick children, high-quality subsidized daycare, and substantial direct child-benefit payments for each child, indicators of child well-being (literacy, levels of child poverty, rates of suicide, etc.) score very high regardless of the difference between single- and dual-parent family structures (Houseknecht and Sastry, 1996).

Cohabitation

Living together before or in lieu of marriage is a growing option for many couples. Cohabitation, when a man and woman live together in a sexual relationship without being married, was practised by an estimated 1.6 million people (16.7% of all census families) in 2011, which shows an increase of 13.9% since 2006 (Statistics Canada, 2012). This surge in cohabitation is likely due to the decrease in social stigma pertaining to the practice. In Quebec in particular, researchers have noted that it is common for married couples under the age of 50 to describe themselves in terms used more in cohabiting relationships than marriage: *mon conjoint* (partner) or *mon* chum (intimate friend) rather than *mon mari* (my husband) (Le Bourdais and Juby, 2002). In fact, cohabitation or common-law marriage is much more prevalent in Quebec (31.5% of census families) and the Northern Territories (from 25.1% in Yukon to 32.7% in Nunavut) than in the rest of the country (13% in British Columbia, for example) (Statistics Canada, 2012).

Cohabitating couples may choose to live together in an effort to spend more time together or to save money on living costs. Many couples view cohabitation as a "trial run" for marriage. Today, approximately 28% of men and women cohabitated before their first marriage. By comparison, 18% of men and 23% of women married without ever cohabitating (U.S. Census Bureau, 2010). The vast majority of cohabitating relationships eventually result in marriage; only 15% of men and women cohabitate only and do not marry. About one-half of cohabitators transition into marriage within three years (U.S. Census Bureau, 2010).

While couples may use this time to "work out the kinks" of a relationship before they wed, the most recent research has found that cohabitation has little effect on the success of a marriage. Those who do not cohabitate before marriage have slightly better rates of remaining married for more than 10 years (Jayson, 2010). Cohabitation may contribute to

the increase in the number of men and women who delay marriage. The average age of first marriage has been steadily increasing. In 2008, the average age of first marriage was 29.6 for women and 31 for men, compared to 23 for women and 25 for men through most of the 1960s and 1970s (Milan, 2013).

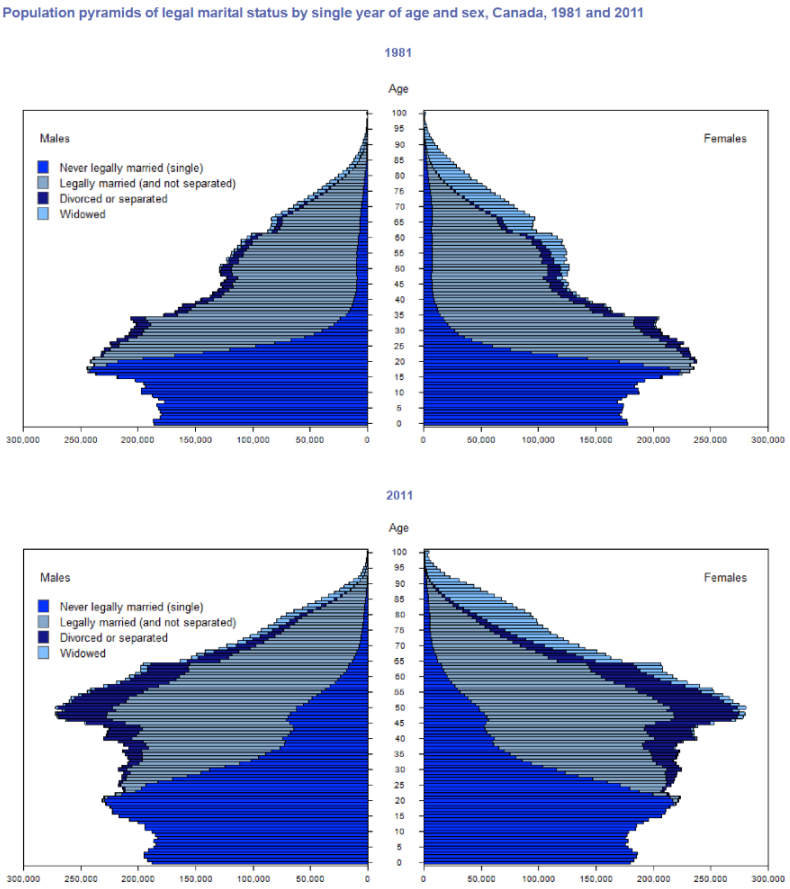


Figure 14.9 As shown by these population pyramids of marital status, more young people are choosing to delay or opt out of marriage. (Milan, Anne. 2013; Population pyramids courtesy of Statistics Canada)

Same-Sex Couples

The number of same-sex couples has grown significantly in the past decade. The Civil Marriage Act (Bill C-38) legalized same sex marriage in Canada on July 20, 2005. Some provinces and territories had already adopted legal same-sex marriage, beginning with Ontario in June 2003. In 2011, Statistics Canada reported 64,575 same-sex couple households in Canada, up by 42% from 2006. Of these, about three in ten were same-sex married couples compared to 16.5% in 2006 (Statistics Canada, 2012). These increases are a result of more coupling, the change in the marriage laws, growing social acceptance of homosexuality, and a subsequent increase in willingness to report it.

In Canada, same-sex couples make up 0.8% of all couples. Unlike in the United States where the distribution of same-sex couples nationwide is very uneven, ranging from as low as 0.29% in Wyoming to 4.01% in the District of Columbia (U.S. Census Bureau, 2011), the distribution of same-sex couples in Canada by province or territory is similar to that of opposite-sex couples. However, same-sex couples are more highly concentrated in big cities. In 2011, 45.6% of all same-sex sex couples lived in Vancouver, Toronto, and Montreal, compared to 33.4% of opposite-sex couples (Statistics Canada, 2012). In terms of demographics, Canadian same-sex couples tended to be younger than opposite-sex couples. 25% of individuals in same-sex couples were under the age of 35 compared to 17.5% of individuals in opposite-sex couples. There were more male-male couples (54.5%) than female-female couples (Milan, 2013). Additionally, 9.4% of same-sex couples were raising children, 80% of whom were female-female couples (Statistics Canada, 2012).

While there is some concern from socially conservative groups (especially in the United States) regarding the well-being

of children who grow up in same-sex households, research reports that same-sex parents are as effective as opposite-sex parents. In an analysis of 81 parenting studies, sociologists found no quantifiable data to support the notion that opposite-sex parenting is any better than same-sex parenting. Children of lesbian couples, however, were shown to have slightly lower rates of behavioural problems and higher rates of self-esteem (Biblarz and Stacey, 2010).

Staying Single

Gay or straight, a new option for many Canadians is simply to stay single. In 2011, about one-fifth of all individuals over the age of 15 did not live in a couple or family (Statistics Canada, 2012). Never-married individuals accounted for 73.1% of young adults in the 25 to 29 age bracket, up from 26% in 1981 (Milan, 2013). More young men in this age bracket are single than young women — 78.8% to 67.4% — reflecting the tendency for men to marry at an older age and to marry women younger than themselves (Milan, 2013).

Although both single men and single women report social pressure to get married, women are subject to greater scrutiny. Single women are often portrayed as unhappy "spinsters" or "old maids" who cannot find a man to marry them. Single men, on the other hand, are typically portrayed as lifetime bachelors who cannot settle down or simply "have not found the right girl." Single women report feeling insecure and displaced in their families when their single status is disparaged (Roberts, 2007). However, single women older than 35 report feeling secure and happy with their unmarried status, as many women in this category have found success in their education and careers. In general, women feel more independent and more prepared to live a large portion of their adult lives without a spouse or domestic partner than they did in the 1960s (Roberts, 2007).

The decision to marry or not to marry can be based a variety of factors including religion and cultural expectations. Asian individuals are the most likely to marry while Black North Americans are the least likely to marry (Venugopal, 2011). Additionally, individuals who place no value on religion are more likely to be unmarried than those who place a high value on religion. For Black women, however, the importance of religion made no difference in marital status (Bakalar, 2010). In general, being single is not a rejection of marriage; rather, it is a lifestyle that does not necessarily include marriage. By age 40, according to census figures, 20% of women and 14% of men will have never married (U.S. Census Bureau, 2011).



Figure 14.10. More and more Canadians are choosing lifestyles that don't include marriage. (Photo courtesy of Glenn Harper/ flickr)

Theoretical Perspectives on Marriage and Family

Sociologists study families on both the macro- and micro-level to determine how families function. Sociologists may use a variety of theoretical perspectives to explain events that occur within and outside of the family. In this *Introduction to Sociology*, we have been focusing on three perspectives: structural functionalism, critical sociology, and symbolic interactionism.

Functionalism

When considering the role of family in society, functionalists uphold the notion that families are an important social

institution and that they play a key role in stabilizing society. They also note that family members take on status roles in a marriage or family. The family — and its members — perform certain functions that facilitate the prosperity and development of society.

Anthropologist George Murdock defined the family narrowly as "a social group characterized by common residence, economic cooperation, and reproduction," which "includes adults of both sexes, at least two of whom maintain a socially approved sexual relationship, and one or more children" (Murdock, 1949). Murdock conducted a survey of 250 societies and determined that there are four universal residual functions of the family: sexual, reproductive, educational, and economic (Lee, 1985). In each society, although the structure of the family varies, the family performs these four functions.

According to Murdock, the family (which for him includes the state of marriage) regulates sexual relations between individuals. He does not deny the existence or impact of premarital or extramarital sex, but states that the family offers a socially legitimate sexual outlet for adults (Lee, 1985). Although societies differ greatly to the degree that that they place limitations on sexual behaviour, all societies have norms governing sexual behavior. The function of the family is to establish the stated norms around sexual gratification.

This outlet for legitimate sexual relations gives way to reproduction, which is a necessary part of ensuring the survival of society. Each society needs to replace the older people with new generations of young people. Again, the institution of the family provides a socially legitimate and regulated form in which children are produced and given recognized status in society. Societies which practice celibacy, like the religious community of the Shakers — an offshoot of the Quakers who believed in the second appearance of Jesus Christ — were dysfunctional in this regard as they were unable to maintain sufficient population to remain viable. By the 1920s there were only 12 Shaker communities left in the United States.

Once children are produced, the family plays a vital role in training them for adult life. As the primary agent of socialization, the family teaches young children the ways of thinking and behaving that follow social and cultural norms, values, beliefs, and attitudes. Parents teach their children manners and civility. A well-mannered child (presumably) reflects a well-mannered parent. In most societies, the family unit is responsible for establishing the emotional security and sense of personal self-worth of its members, which begins in childhood. When families fail to do this they are seen as dysfunctional.

Parents also teach children gender roles. Gender roles are an important part of the economic function of a family. The functionalist Talcott Parsons (1943) emphasized that in each family, there is a division of labour that consists of instrumental and expressive roles. Men tend to assume the instrumental roles in the family, which typically involve work outside of the family that provides financial support and establishes family status. Women tend to assume the expressive roles, which typically involve work inside of the family, which provides emotional support and physical care for children (Crano and Aronoff, 1978). According to functionalists, the differentiation of the roles on the basis of sex ensures that families are well-balanced and coordinated. Each family member is seen as performing a specific role and function to maintain the functioning of the family as a whole. Each family member has a socially recognized role that reduces internal competition for status within the family, and ambiguity about the status of the family in the external community.

When family members move outside of these roles, the family is thrown out of balance and must recalibrate in order to function properly. For example, if the father assumes an expressive role, such as providing daytime care for the children, the mother must take on an instrumental role such as gaining paid employment outside of the home in order for the family to maintain balance and function. Stay-at-home dads are becoming more common today but their non-traditional role still produces ambiguity in their claim to status in the community.

Parsons (1943) also argued that in modern North American society, the differentiation between these roles created tension or strain on individuals as they tried to adapt to the conflicting norms or requirements (roles) between the American occupational and kinship systems. There was an "asymmetrical relation of the marriage pair to the occupational structure" in which the norms of equality between spouses in the family system were undermined by the inequality of status in the occupational system between paid employment outside the home and unpaid domestic work inside the home. Parsons argued that the result of this division was strain in relation to the patterning of sex roles. While men became narrow instrumental specialists, incapable of a full expressive life, women turned "neurotically" to expressive tasks to create a functional equivalent to demonstrate their skills and fundamental equality to their husbands.

> There is also, however, a good deal of direct evidence of tension in the feminine role. In the "glamour girl" pattern, use of specifically feminine devices as an instrument of compulsive search for power and exclusive attention are conspicuous. Many women succumb to their dependency cravings through such channels as

> neurotic illness or compulsive domesticity and thereby abdicate both their responsibilities and their opportunities for genuine independence. Many of the attempts to excel in approved channels of achievement are marred by garishness of taste, by instability in response to fad and fashion, by a seriousness in community or club activities which is out of proportion to the intrinsic importance of the task. In all these and other fields there are conspicuous signs of insecurity and ambivalence. Hence it may be concluded that the feminine role is a conspicuous focus of the strains inherent in our social structure, and not the least of the sources of these strains is to be found in the functional difficulties in the integration of our kinship system with the rest of the social structure (Parsons, 1949)

The fourth function of the family Murdock identified is economic. The family is understood as a primary economic unit where the economic well-being of family members is provided. In premodern family forms, the extended family itself is the basis of the economy. As a unit it produces the basic needs of its members including food, shelter, health care, and comfort in general. In modern society, some of these economic functions, like production and health care, are taken over by other social institutions, but the family remains the principle unit of consumption. Family members coordinate their incomes to provide economically for the rest of the family.

Critical Sociology

Critical sociologists are quick to point out that North American families have been defined as private entities, the consequence of which (historically) has been to see family matters as issues concerning only those within the family. Serious issues including domestic violence and child abuse, inequality between the sexes, the right to dispose of family property equally, and so on, have been historically treated as being outside of state, legal, or police jurisdiction. The feminist slogan of the 1960s and 1970s — "the personal is the political" — indicates how feminists began to draw attention to the broad social or *public* implications of matters long considered private or inconsequential. As women's roles had long been relegated to the private sphere, issues of power that affected their lives most directly were largely invisible. Speaking about the lives of middle-class women in mid-century North America, Betty Friedan described this problem as "the problem with no name":

> The problem lay buried, unspoken, for many years in the minds of American women. It was a strange stirring, a sense of dissatisfaction, a yearning that women suffered in the middle of the 20th century in the United States. Each suburban wife struggled with it alone. As she made the beds, shopped for groceries, matched slipcover material, ate peanut butter sandwiches with her children, chauffeured Cub Scouts and Brownies, lay beside her husband at night — she was afraid to ask even of herself the silent question — "Is this all?" (1963, p. 15).

One focus of critical sociology therefore is to highlight the political-economic context of the inequalities of power in family life. The family is often not a haven but rather an arena where the effects of societal power struggles are felt. This exercise of power often entails the differentiation and performance of family status roles. *Why* are women expected to perform the "expressive" roles in the family while the men perform "instrumental" roles, and what are the implications of this division of labour? Critical sociologists therefore study conflicts as simple as the enforcement of rules from parent to child, or more serious issues such as domestic violence (spousal and child), sexual assault, marital rape, and incest, as products of power structures in broader society. Blood and Wolfe's classic (1960) study of marital power found that the person with the most access to value resources held the most power. As money is one of the most valuable resources, men who worked in paid labour outside of the home held more power than women who worked inside the home. Disputes over the division of household labour tend also to be a common source of marital discord. Household labour offers no wages and, therefore, no power. Studies indicate that when men do more housework, women experience more satisfaction in their marriages, reducing the incidence of conflict (Coltrane, 2000).

The political and economic context is also key to understanding changes in the structure of the family over the 20th and 21st centuries. The debate between functionalist and critical sociologists on the rise of non-nuclear family forms is a case in point. Since the 1950s, the functionalist approach to the family has emphasized the importance of the nuclear family — a married man and woman in a socially approved sexual relationship with at least one child — as the basic unit of an orderly and functional society. Although only 39% of families conformed to this model in 2006, in functionalist approaches, it

often operates as a model of the *normal* family, with the implication that non-normal family forms lead to a variety of society-wide dysfunctions. On the other hand, critical perspectives emphasize that the diversity of family forms does not indicate the "decline of the family" (i.e., of the ideal of the nuclear family) so much as the diverse response of the family form to the tensions of gender inequality and historical changes in the economy and society. The nuclear family should be thought of less as a normative model for how families should be, and more as an historical anomaly that reflected the specific social and economic conditions of the two decades following World War II.

Symbolic Interactionism

Interactionists view the world in terms of symbols and the meanings assigned to them (LaRossa and Reitzes, 1993). The family itself is a symbol. To some, it is a father, mother, and children; to others, it is any union that involves respect and compassion. Interactionists stress that family is not an objective, concrete reality. Like other social phenomena, it is a social construct that is subject to the ebb and flow of social norms and ever-changing meanings.

Consider the meaning of other elements of family: "parent" was a symbol of a biological and emotional connection to a child. With more parent-child relationships developing through adoption, remarriage, or change in guardianship, the word "parent" today is less likely to be associated with a biological connection than with whoever is socially recognized as having the responsibility for a child's upbringing. Similarly, the terms "mother" and "father" are no longer rigidly associated with the meanings of caregiver and breadwinner. These meanings are more free-flowing through changing family roles.

Interactionists also recognize how the family status roles of each member are socially constructed, which plays an important part in how people perceive and interpret social behaviour. Interactionists view the family as a group of role players or "actors" that come together to act out their parts in an effort to construct a family. These roles are up for interpretation. In the late 19th and early 20th century, a "good father," for example, was one who worked hard to provide financial security for his children. Today, a "good father" is one who takes the time outside of work to promote his children's emotional well-being, social skills, and intellectual growth — in some ways, a much more daunting task.

Symbolic interactionism therefore draws our attention to *how* the norms that define what a "normal" family is, and how it should operate, come into existence. The rules and expectations that coordinate the behaviour of family members are products of social processes and joint agreement, even if the agreements are tacit or implicit. In this perspective, norms and social conventions are not regarded as permanently fixed by functional requirements or unequal power relationships. Rather, new norms and social conventions continually emerge from ongoing social interactions to make family structures intelligible in new situations, and to enable them to operate and sustain themselves.

14.3. Challenges Families Face

As the structure of family changes over time, so do the challenges families face. Events like divorce and remarriage present new difficulties for families and individuals. Other long-standing domestic issues, such as abuse, continue to strain the health and stability of families.

Divorce and Remarriage

Divorce, while fairly common and accepted in modern Canadian society, was once a word that would only be whispered and was accompanied by gestures of disapproval. Prior to the introduction of the Divorce Act in 1968 there was no federal divorce law in Canada. In provincial jurisdictions where there were divorce laws, spouses had to prove adultery or cruelty in court. The 1968 Divorce Act broadened the grounds for divorce to include mental and physical cruelty, desertion, and/or separation for more than three years, and imprisonment. In 1986, the Act was amended again to make "breakdown of marriage" the sole ground for divorce. Couples could divorce after one year's separation, and there was no longer a requirement to prove "fault" by either spouse.

These legislative changes had immediate consequences on the divorce rate. In 1961, divorce was generally uncommon, affecting only 36 out of every 100,000 married persons. In 1969, the year after the introduction of the Divorce Act, the number of divorces doubled from 55 divorces per 100,000 population to 124. The divorce rate peaked in 1987, after the 1986 amendment, at 362 divorces per 100,000 population. Over the last quarter century divorce rates have dropped steadily, reaching 221 divorces per 100,000 population in 2005 (Kelly, 2010). The dramatic increase in divorce rates after the 1960s has been associated with the liberalization of divorce laws (as noted above); the shift in societal makeup, including

the increase of women entering the workforce (Michael, 1978); and marital breakdowns in the large cohort of baby boomers (Kelly, 2010). The decrease in divorce rates can be attributed to two probable factors: an increase in the age at which people get married, and an increased level of education among those who marry — both of which have been found to promote greater marital stability.

Table 14.2. Crude divorce rate per 100,000 people in Canada, provinces, and territories: 1961–2005. After peaking in 1987 there has been a steady decrease in divorce rates. (Source: Kelly (2010). Table courtesy of Statistics Canada)

[Skip Table]

Province or Territory	**1961**	**1968**	**1969**	**1985**	**1986**	**1987**	**1990**	**1995**	**2000**	**2005**
Canada	**36.0**	**54.8**	**124.2**	**238.9**	**298.8**	**362.3**	**282.3**	**262.2**	**231.2**	**220.7**
Newfoundland and Labrador	1.3	3.0	20.0	96.6	118.8	193.7	175.5	170.6	169.9	153.5
Prince Edward Island	7.6	18.2	91.9	166.3	154.5	213.1	214.4	191.0	197.0	204.8
Nova Scotia	33.2	64.8	102.1	263.3	292.4	307.8	265.1	244.6	218.2	209.5
New Brunswick	32.4	22.9	55.3	187.3	237.6	273.1	228.7	191.6	227.3	192.2
Québec	6.6	10.2	49.2	236.4	282.5	324.7	291.6	274.5	231.2	203.0
Ontario	43.9	69.3	160.4	223.4	290.7	403.7	280.2	264.4	223.8	229.4
Manitoba	33.9	47.9	136.3	213.3	272.6	356.5	252.4	235.3	212.0	206.9
Saskatchewan	27.1	40.0	92.1	187.3	240.0	286.4	233.9	228.4	214.7	194.1
Alberta	78.0	125.7	221.0	336.0	391.8	390.2	332.1	276.6	271.7	246.4
British Columbia	85.8	110.8	205.0	278.6	374.1	397.6	296.1	275.0	246.8	233.8
Yukon	164.1	200.0	262.5	389.9	379.6	546.6	289.0	371.9	222.4	350.2
Northwest Territories		36.7	96.8	130.8	171.6	195.8	115.0	142.8	229.8	152.5
Nunavut	Nunavut is included in the Northwest Territories before 2000.								25.5	33.3

So what causes divorce? While more young people are choosing to postpone or opt out of marriage, those who enter into the union do so with the expectation that it will last. A great deal of marital problems can be related to stress, especially financial stress. According to researchers participating in the University of Virginia's National Marriage Project, couples who enter marriage without a strong asset base (like a home, savings, and a retirement plan) are 70% more likely to be divorced after three years than are couples with at least $10,000 in assets. This is connected to factors such as age and education level that correlate with low incomes.

The addition of children to a marriage creates added financial and emotional stress. Research has established that marriages enter their most stressful phase upon the birth of the first child (Popenoe and Whitehead, 2001). This is particularly true for couples who have multiples (twins, triplets, and so on). Married couples with twins or triplets are 17% more likely to divorce than those with children from single births (McKay, 2010). Another contributor to the likelihood of divorce is a general decline in marital satisfaction over time. As people get older, they may find that their values and life goals no longer match up with those of their spouse (Popenoe and Whitehead, 2004).

Divorce is thought to have a cyclical pattern. Children of divorced parents are 40% more likely to divorce than children of married parents. And when we consider children whose parents divorced and then remarried, the likelihood of their own divorce rises to 91% (Wolfinger, 2005). This might result from being socialized to a mindset that a broken marriage can be replaced rather than repaired (Wolfinger, 2005). That sentiment is also reflected in the finding that when both partners of a married couple have been previously divorced, their marriage is 90% more likely to end in divorce (Wolfinger, 2005).

Samuel Johnson is quoted as saying that getting married a second time was "the triumph of hope over experience." In fact, according to the 2001 Statistics Canada General Social Survey, 43% of individuals whose first marriage failed married again, while 16% married again after the death of their spouse. Another 1% of the ever-married population (people who have been married but may not currently be married), aged 25 and over, had been married more than twice (Clark and

Crompton, 2006). American data show that most men and women remarry within five years of a divorce, with the median length for men (three years) being lower than for women (4.4 years). This length of time has been fairly consistent since the 1950s. The majority of those who remarry are between the ages of 25 and 44 (Kreider, 2006).

Marriage the second time around (or third or fourth time around) can be a very different process than the first. Remarriage lacks many of the classic courtship rituals of a first marriage. In a second marriage, individuals are less likely to deal with issues like parental approval, premarital sex, or desired family size (Elliot, 2010). Clark and Crompton suggest that second marriages tend to be more stable than first marriages, largely because the spouses are older and more mature. At the time of the Statistics Canada General Social Survey, 71% of the remarried couples surveyed were still together and had been for an average of 13 years. Couples tend to marry a second time more for intimacy-based reasons rather than external reasons and therefore enjoy a greater quality of relationship (Clark and Crompton, 2006).

Making Connections: Sociological Research

Do Half of All Marriages End in Divorce?

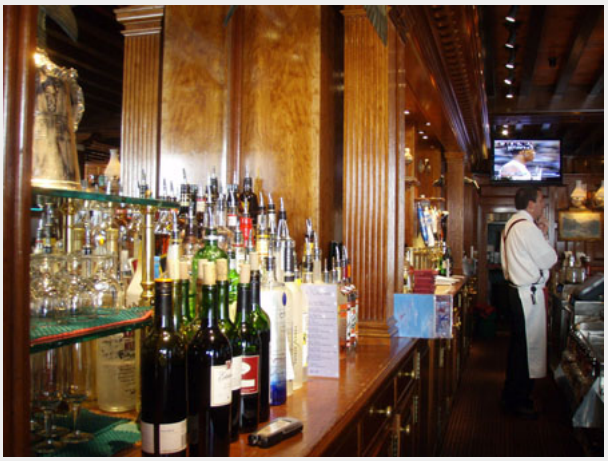


Figure 14.11. Bartenders are among the professions with the highest divorce rates (38.4%). Other traditionally low-wage industries (like restaurant service, custodial employment, and factory work) are also associated with higher divorce rates. (Aamodt and McCoy, 2010). (Photo courtesy of Daniel Lobo/ flickr)

It is often cited that half of all marriages end in divorce. This statistic has made many people cynical when it comes to marriage, but it is misleading. A closer look at the data reveals a different story.

Using Statistics Canada data from 2008 that show a marriage rate of 4.4 (per 1,000 people) and a divorce rate of 2.11, it would appear that slightly less than one-half of all marriages failed (Employment and Social Development Canada, 2014a, 2014b). Similar United States data for 2003 showed more or less exactly 50% of marriages ending in divorce (Hurley, 2005). This reasoning is deceptive, however, because instead of tracing actual marriages to see their longevity (or lack thereof), this compares unrelated statistics. That is, the number of marriages in a given year does not have a direct correlation to the divorces occurring that same year. American research published in the *New York Times* took a different approach — determining how many people had ever been married, and of those, how many later divorced. The result? According to this analysis, American divorce rates have only gone as high as 41% (Hurley, 2005).

Another way to calculate divorce rates is the **total divorce rate**, which projects how many new marriages would be expected to fail after 30 years based on the divorce rate by marriage duration observed in a given year. In Canada, the total divorce rate figure reached a high of 50.6% in 1987, after the Divorce Act was amended to allow divorces after just one year of separation (rather than the mandatory three years previously). Since then, the total divorce rate

has remained steady at between 35% and 42%. In 2008, 40.7% of marriages were projected to end before their 30th anniversary (Employment and Social Development Canada, 2014a).

Sociologists can also calculate divorce rates through a cohort study. For instance, we could determine the percentage of marriages that are intact after, say, five or seven years, compared to marriages that have ended in divorce after five or seven years. Sociological researchers must remain aware of research methods and how statistical results are applied. As illustrated, different methodologies and different interpretations can lead to contradictory, and even misleading results.

Children of Divorce and Remarriage

Divorce and remarriage can be stressful for partners and children alike. Divorce is often justified by the notion that children are better off in a divorced family than in a family with parents who do not get along. Others argue that parents who divorce sacrifice their children's well-being to pursue their own happiness.

Research suggests that separating out particular factors of the divorce, especially whether or not the divorce is accompanied by parental conflict, is key to determining whether divorce has a significant negative impact on children (Amato and Keith, 1991). Certainly while marital conflict does not provide an ideal childrearing environment, going through a divorce can also be damaging. Children are often confused and frightened by the threat to their family security. They may feel responsible for the divorce and attempt to bring their parents back together, often by sacrificing their own well-being (Amato, 2000). Only in high-conflict homes do children benefit from divorce and the subsequent decrease in conflict. The majority of divorces however come out of lower-conflict homes, and children from those homes are more negatively impacted by the stress of the divorce than the stress of unhappiness in the marriage (Amato, 2000).

On the other hand, Amato and Keith have argued that the overall the effect of divorce on children's well-being is relatively weak and has been declining over time. Children of divorces experience higher levels of well-being than children of intact, but highly conflictual marriages Divorces that are not accompanied by parental conflict do less harm to children. (Amato and Keith, 1991). These findings would appear to lend credence to modern processes of *family mediation* in divorces where where a neutral third party helps people to negotiate a settlement to their dispute (BC Ministry of Attorney General, 2003).

Children's ability to deal with a divorce may depend on their age. Research has found that divorce may be most difficult for school-aged children, as they are old enough to understand the separation but not old enough to understand the reasoning behind it. Older teenagers are more likely to recognize the conflict that led to the divorce but may still feel fear, loneliness, guilt, and pressure to choose sides. Infants and preschool-age children may suffer the heaviest impact from the loss of routine that the marriage offered (Temke, 2006).

Proximity to parents also makes a difference in a child's well-being after divorce. Boys who live or have joint arrangements with their fathers show less aggression than those who are raised by their mothers only. Similarly, girls who live or have joint arrangements with their mothers tend to be more responsible and mature than those who are raised by their fathers only. Nearly 70% of the children of parents who are divorced have their primary residence with their mother, leaving many boys without a father figure residing in the home. Another 15% of the children lived with their father and 9% moved back and forth between both parents equally (Sinha, 2014). Still, researchers suggest that a strong parent-child relationship can greatly improve a child's adjustment to divorce (Temke, 2006).

There is empirical evidence that divorce has not discouraged children in terms of how they view marriage and family. In a survey conducted by researchers from the University of Michigan, about three-quarters of high school students said it was "extremely important" to have a strong marriage and family life. And over half believed it was "very likely" that they would be in a lifelong marriage (Popenoe, and Whitehead, 2001). These numbers have continued to climb over the last 25 years.

Violence and Abuse

Violence and abuse are among the most disconcerting of the challenges that today's families face. Abuse can occur between spouses, between parent and child, as well as between other family members. The frequency of violence among families is difficult to determine because many cases of spousal abuse and child abuse go unreported. In any case, studies have shown that abuse (reported or not) has a major impact on families and society as a whole.

Domestic Violence

Domestic violence is a significant social problem in Canada. One in four victims of violent crime in Canada was victimized by a spouse or family member in 2010 (Sinha, 2012). Domestic violence is often characterized as violence between household or family members, specifically spouses. To include unmarried, cohabitating, and same-sex couples, family sociologists have created the term **intimate partner violence (IPV)**. Women are the primary victims of intimate partner violence. It is estimated that 1 in 4 women has experienced some form of IPV in her lifetime (compared to 1 in 7 men) (Catalano, 2007). In 2011, women in Canada had more than double the risk of men of becoming a victim of police-reported family violence (Sinha, 2012). IPV may include physical violence, such as punching, kicking, or other methods of inflicting physical pain; sexual violence, such as rape or other forced sexual acts; threats and intimidation that imply either physical or sexual abuse; and emotional abuse, such as harming another's sense of self-worth through words or controlling another's behaviour. IPV often starts as emotional abuse and then escalates to other forms or combinations of abuse (Centers for Disease Control, 2012).



Figure 14.12. Over the past 30 years, the rate of spousal homicides against females has consistently been about three to four times higher than that for males (Statistics Canada, 2011). What does this statistic reveal about societal patterns and norms concerning intimate relationships and gender roles? (Photo courtesy of Kathy Kimpel/flickr)

In 2010, of IPV acts that involved physical actions against women, 71% involved physical assault (57% were common assaults including punching, slapping, and pushing, while another 10% were major assaults involving a weapon or causing major bodily injury); 3% involved sexual assault; 10% involved uttering threats; 5% indecent or threatening phone calls; and 9% criminal harassment or stalking (Sinha, 2012). This is slightly different than IPV abuse patterns for men, which show that 79% of acts of IPV take the form of physical violence, and less than 1% involve sexual assault (Sinha, 2012). Interestingly, in 2011, a slightly larger proportion of physical assaults against male intimate partners resulted in injury (55%) compared to female intimate partners (51%) (Sinha, 2013). IPV affects women at greater rates than men because women often take the passive role in relationships and may become emotionally dependent on their partner. Perpetrators of IPV work to establish and maintain such dependence in order to hold power and control over their victims, making them feel stupid, crazy, or ugly — in some way worthless. Between 2000 and 2010, nearly one-quarter of women who were murdered by their intimate partners were murdered for reasons of jealousy — compared to 10% of male victims (Sinha, 2012).

IPV affects different segments of the population at different rates. The rate of self-reported IPV for Aboriginal women is about 2.5 times higher than for non-Aboriginal women (Sinha, 2013). The severity of intimate partner violence also differed. Nearly 6 in 10 Aboriginal women reported injury as a result of IPV compared to 4 in 10 non-Aboriginal women. As a result, Aboriginal female victims were also much more likely to report that they feared for their lives as a result of IPV (52% compared to 31% of non-Aboriginal women) (Sinha, 2013). On the other hand, visible minority and immigrant

groups do not have significantly different levels of self-reported spousal violence than the rest of the population (Statistics Canada, 2011).

Those who are separated report higher rates of abuse than those with other marital statuses, as conflict is typically higher in those relationships. Similarly, those who are cohabitating or living in a common-law relationship are more likely than those who are married to experience IPV (Statistics Canada, 2011). American researchers have found that the rate of IPV doubles for women in low-income disadvantaged areas when compared to IPV experienced by women who reside in more affluent areas (Benson and Fox, 2004). In Canada, the statistics do not bear this relationship out. Household income and education levels appear to have little effect on experiencing spousal violence. Regardless of income level, the proportion of reported spousal violence was between 1 and 2%. However, rates of IPV were nearly double in rural Canada than in the major metropolitan areas (542 incidents per 100,000 population compared to 294). Overall, women ages 25 to 34 are at the greatest risk of physical or sexual assault by an intimate partner (Statistics Canada, 2011).

Accurate statistics on IPV are difficult to determine, as less than one-quarter of victims report incidents to the police (Statistics Canada, 2011). It is not until victims choose to report crimes that patterns of abuse are exposed. Two-thirds of victims in Statistics Canada self-reported victimization studies stated that abuse had occurred more than once prior to their first police report. Nearly 3 in 10 stated that they had been abused more than 10 times prior to reporting (Statistics Canada, 2011).

According to the Statistics Canada General Social Survey (2009) , victims cite varied reasons why they are reluctant to report abuse, as shown in Table 14.3.

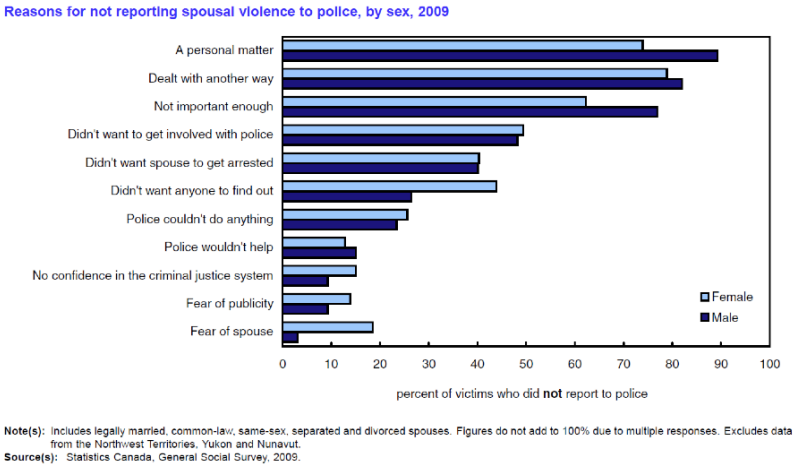


Table 14.3 This chart shows reasons that victims give for why they fail to report abuse to police authorities [Long Description] (Statistics Canada 2011).

IPV has significant long-term effects on individual victims and on society. Studies have shown that IPV damage extends beyond the direct physical or emotional wounds. Extended IPV has been linked to unemployment among victims, as many have difficulty finding or holding employment. Additionally, nearly all women who report serious domestic problems exhibit symptoms of major depression (Goodwin, Chandler, and Meisel, 2003). Female victims of IPV are also more likely to abuse alcohol or drugs, suffer from eating disorders, and attempt suicide (Silverman et al., 2001).

IPV is indeed something that impacts more than just intimate partners. In a survey, 34% of respondents said they have witnessed IPV, and 59% said that they know a victim personally (Roper Starch Worldwide, 1995). Many people want to help IPV victims but are hesitant to intervene because they feel that it is a personal matter or they fear retaliation from the abuser — reasons similar to those of victims who do not report IPV.

Making Connections: Social Policy and Debate

Corporal Punishment



Figure 14.13. Corporal punishment. (Image courtesy of HA! Designs – Artbyheather/Flickr)

News reports in June 2013 broke the sensational story of dozens of children being apprehended by Child and Family Services from a small Old Order Mennonite community in southern Manitoba. Several members of the community were charged by police with assault when they received reports that children had been disciplined using a leather strap, whip, and cattle prod (Hitchen, 2013). At one point, all the children except for one 17-year-old had to be apprehended by authorities (CBC News, 2013). The 1892 law that permits the use of corporal punishment for children in Canada was upheld by a Supreme Court ruling in 2004 within certain restrictions, but corporal punishment remains a controversial issue in Canada (CBC News, 2004).

Physical abuse of children may come in the form of beating, kicking, throwing, choking, hitting with objects, burning, or other methods. Injury inflicted by such behaviour is considered abuse even if the parent or caregiver did not intend to harm the child. Other types of physical contact that are characterized as discipline (spanking, for example) are not considered abuse as long as no injury results. The Supreme Court ruling stated that teachers and parents can use reasonable corrective force against children between the ages of 2 and 12 years old as long as the force is "minor" and of "a transitory and trifling nature" (CBC News, 2004). The court ruled that it was unacceptable to strike a child with an object, like a strap or whip, and striking a child in the head was also unacceptable.

This issue is rather controversial among modern-day Canadians. While some parents feel that physical discipline, or corporal punishment, is an effective way to respond to bad behaviour, others feel that it is a form of abuse. According to a 2005 study of mothers with preschoolers in Manitoba and Ontario, 70% of respondents reported using corporal punishment. One-third of them used it at least once a week. A poll conducted by the *Globe and Mail* in 2007 found that 78% of Canadian parents with children under 18 believed that parents do not discipline their children enough, and another 42% believed spanking benefited child development (Pearce, 2012).

However, studies have shown that spanking is not an effective form of punishment and may lead to aggression by the victim, particularly in those who are spanked at a young age (Berlin, 2009). A meta-analysis of research conducted over two decades published in the *Canadian Medical Association Journal* found that spanking was no better than other

parenting methods at eliciting compliance in children and was in fact linked not only to increased levels of childhood aggression but also to long-term effects such as depression, emotional and behavioural problems, and drug and alcohol use in adulthood (Durrant and Ensom, 2012). This research led the editor-in-chief of the journal to call for the repeal of the spanking law from the Criminal Code. "It is time for Canada to remove this anachronistic excuse for poor parenting from the statute book" (Fletcher, 2012, p. 1339).

Child Abuse and Corporal Punishment

Children are among the most helpless victims of abuse. In 2010, more than 18,000 children and youth under the age of 17 were victims of police-reported family violence in Canada, accounting for nearly a quarter of all violent offences against children and youth (Sinha, 2012). Child abuse may come in several forms, the most common being neglect, followed by physical abuse, sexual abuse, psychological maltreatment, and medical neglect (Child Help, 2011). Whereas the overall rate of violent crime involving children and youth is lower than the rate for the population as a whole, the rate of sexual assault is five times higher (Sinha, 2012). Level 1 sexual assault (not involving a weapon or aggravated assault) comprised 75% of these offences, while child-specific sexual crimes including sexual interference, invitation to sexual touching, luring a child via a computer, and corrupting children comprised another 22%. Girls were 37% more likely than boys to be the victim of family violence (and almost twice as likely by the time they reached ages 12 to 17 years). In large part, this is because girls are almost four times as likely to be a victim of sexual assault by a family member than boys are.

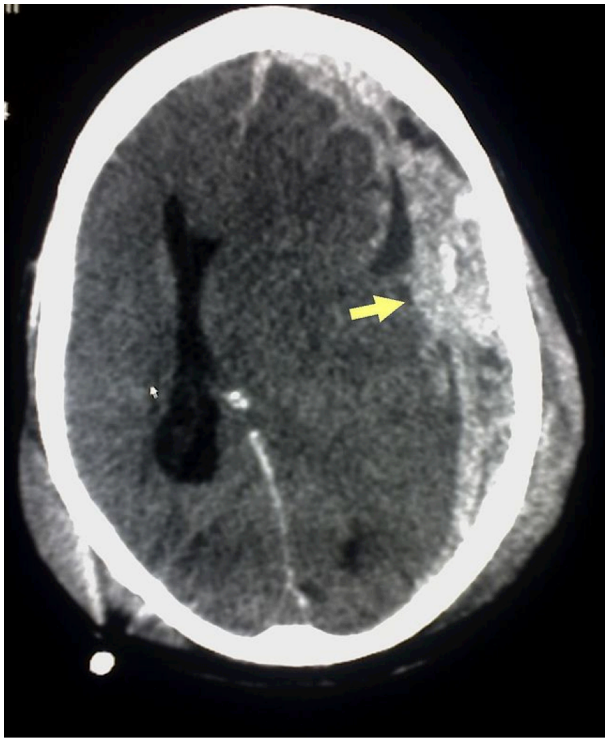


Figure 14.14. The arrow indicates subdural hematoma or bleeding between the dura mater and the brain: one cause of death from shaken-baby syndrome. (Photo courtesy of Wikimedia Commons)

25% of all violent crime against children and youth was perpetrated by a family member (parent, sibling, extended family member, or spouse), while another 54% involved an accused known to the victim (casual acquaintances, close friends, or dating partners) (Sinha, 2012). 59% of family violence against children was committed by parents, 19% by siblings, and 22% by other family members (Statistics Canada, 2011). Understandably, these figures vary with the age of the child. As Sinha (2012) notes, "among youth aged 12 to 17 who had been victimized, about one in five (18%) were violently

victimized by someone within their own family network. This compares to 47% of child victims aged 3 to 11 years, and 70% of infant and toddler victims under the age of 3 years" (p. 58).

In terms of child abuse reported to provincial and territorial child welfare authorities, infants (children less than 1 year old) were the most victimized population with an incident rate of 52 investigations per 1,000 children, compared to 43 per 1,000 for 1- to 3-year-olds, the next highest category (Public Health Agency of Canada, 2010). Infants younger than 1 year are also the most vulnerable to family homicide, 98% of which were committed by parents (27 per million between 2000 and 2010, compared to 9 per million for 1-to 3-year olds, the next highest category) (Sinha, 2012). This age group is particularly vulnerable to neglect because they are entirely dependent on parents for care. Some parents do not purposely neglect their children; factors such as cultural values, standard of care in a community, and poverty can lead to hazardous levels of neglect. If information or assistance from public or private services are available and a parent fails to use those services, child welfare services may intervene (Public Health Agency of Canada, 2010).

Infants are also often victims of physical abuse, particularly in the form of violent shaking. This type of physical abuse is referred to as **shaken-baby syndrome**, which describes a group of medical symptoms such as brain swelling and retinal hemorrhage resulting from forcefully shaking or causing impact to an infant's head. A baby's cry is the number one trigger for shaking. Parents may find themselves unable to soothe a baby's concerns and may take their frustration out on the child by shaking him or her violently. Other stress factors such as a poor economy, unemployment, and general dissatisfaction with parental life may contribute to this type of abuse. Shaken-baby syndrome was attributed as the cause of nearly one-third (31%) of family-related homicides of infants less than 1 year between 2000 and 2010 (Sinha, 2012).

Key Terms

ambilineal: A type of unilateral descent that follows either the father's or the mother's side exclusively.

bigamy: The act of entering into marriage while still married to another person.

bilateral descent: The tracing of kinship through both parents' ancestral lines.

cohabitation: When a couple shares a residence but is not married.

exchange theory: Social relationships are based on giving and returning valued goods or services. Individuals seek to maximize their rewards in their interactions with others.

extended family: A household that includes at least one parent and child as well as other relatives like grandparents, aunts, uncles, and cousins.

family: Socially recognized groups of individuals who may be joined by blood, marriage, or adoption, and who form an emotional connection and an economic unit of society.

family life course: A sociological model of family that sees the progression of events as fluid rather than as occurring in strict stages.

family life cycle: A set of predictable steps and patterns that families experience over time.

family of orientation: The family into which one is born.

family of procreation: A family that is formed through marriage.

fluid modernity: A condition of constant mobility and change in relationships within contemporary society.

intimate partner violence (IPV): Violence that occurs between individuals who maintain a romantic or sexual relationship; includes unmarried, cohabiting, and same-sex couples, as well as heterosexual married couples.

kinship: A person's traceable ancestry (by blood, marriage, and/or adoption).

liquid modernity: See *fluid modernity.*

marriage: A legally recognized contract between two or more people in a sexual relationship, who have an expectation of permanence about their relationship.

matrilineal descent: A type of unilateral descent that follows the mother's side only.

matrilocal residence: A system in which it is customary for a husband to live with his wife's family.

monogamy: When someone is married to only one person at a time.

nuclear family: A cohabiting man and woman who maintain a socially approved sexual relationship and have at least one child.

patrilineal descent: A type of unilateral descent that follows the father's line only.

patrilocal residence: A system in which it is customary for a wife to live with (or near) her husband's family.

polyandry: A form of marriage in which one woman is married to more than one man at one time.

polygamy: The state of being committed or married to more than one person at a time

polygyny: a form of marriage in which one man is married to more than one woman at one time.

shaken-baby syndrome: A group of medical symptoms, such as brain swelling and retinal hemorrhage, resulting from forcefully shaking or impacting an infant's head.

total divorce rate: A projection of how many new marriages are expected to fail after 30 years, based on the divorce rate by marriage duration observed in a given year.

unilateral descent: The tracing of kinship through one parent only.

Section Summary

14.1. What Is Marriage? What Is a Family?

Sociologists view marriage and families as societal institutions that help create the basic unit of social structure. Both marriage and a family may be defined differently — and practised differently — in cultures across the world. Families and marriages, like other institutions, adapt to social change.

14.2. Variations in Family Life

Canadians' concepts of marriage and family are changing. Increases in cohabitation, same-sex partners, and singlehood are altering our ideas of marriage. Similarly, single parents, same-sex parents, cohabitating parents, and unwed parents are changing our notion of what it means to be a family. While many children still live in opposite-sex, two-parent, married households, these are no longer viewed as the only type of nuclear family.

14.3. Challenges Families Face

Families face a variety of challenges, including divorce, domestic violence, and child abuse. While divorce rates have decreased in the last 25 years, many family members, especially children, still experience the negative effects of divorce. Children are also negatively impacted by violence and abuse within the home; 18,000 children are victimized by family violence each year.

Section Quiz

14.1. What Is Marriage? What Is a Family?

1. Sociologists tend to define family in terms of:

    1. How a given society sanctions the relationships of people who are connected through blood, marriage, or adoption.
    2. The connection of bloodlines.
    3. The status roles that exist in a family structure.
    4. How closely members adhere to social norms.

2. Research suggests that people generally feel that their current family is _____ than the family they grew up with.

    1. Less close
    2. More close

3. At least as close
4. None of the above

3. A woman being married to two men would be an example of:

1. Monogamy.
2. Polygyny.
3. Polyandry.
4. Cohabitation.

4. A child who associates his line of descent with his father's side only is part of a _____ society.

1. Matrilocal
2. Bilateral
3. Matrilineal
4. Patrilineal

5. Which of the following is a criticism of the family life cycle model?

1. It is too broad and accounts for too many aspects of family.
2. It is too narrowly focused on a sequence of stages.
3. It does not serve a practical purpose for studying family behaviour.
4. It is not based on comprehensive research.

14.2. Variations in Family Life

6. The majority of Canadian children live in _____.

1. Two-parent households.
2. One-parent households.
3. No-parent households.
4. Multigenerational households.

7. According to the study cited from Statistics Canada, children who live with _____ grow up with more advantages than children who live with _____.

1. One unwed parent; one divorced parent
2. One divorced parent; two married parents
3. One grandparent; two married parents
4. One divorced parent; one unwed parent

8. Couples who cohabitate before marriage are _____ couples who did not cohabitate before marriage to be married at least 10 years.

1. Far more likely than
2. Far less likely than
3. Slightly less likely than
4. Equally as likely as

9. Same-sex couple households account for _____ percent of Canadian households.

1. 1

2. 10
3. 15
4. 30

10. The median age of first marriage has _____ in the last 50 years.

1. Increased for men but not women
2. Decreased for men but not women
3. Increased for both men and women
4. Decreased for both men and women

14.3. Challenges Families Face

11. Current divorce rates are _____.

1. At an all-time high
2. At an all-time low
3. Steadily increasing
4. Steadily declining

12. Children of divorced parents are _____ to divorce in their own marriage than children of parents who stayed married.

1. More likely
2. Less likely
3. Equally likely

13. In general, children in _____ households benefit from divorce.

1. Stepfamily
2. Multigenerational
3. High-conflict
4. Low-conflict

14. Which of the following is true of intimate partner violence (IPV)?

1. IPV victims are more frequently men than women.
2. One in 10 women is a victim of IPV.
3. Aboriginal women are nearly 2.5 times more likely to be a victim of IPV than non-Aboriginal women.
4. Rape is the most common form of IPV.

15. Which type of child abuse is most prevalent in Canada?

1. Physical abuse
2. Neglect
3. Shaken-baby syndrome
4. Internet stalking

[Quiz answers at end of chapter]

Short Answer

14.1. What Is Marriage? What Is a Family?

1. According to research, what are Canadians' general thoughts on family? How do they view nontraditional family structures? How do you think these views might change in 20 years?
2. Explain the difference between bilateral and unilateral descent. Using your own association with kinship, explain which type of descent applies to you.

14.2. Variations in Family Life

1. Explain the different variations of the nuclear family and the trends that occur in each.
2. Why are some couples choosing to cohabit before marriage? What effect does cohabitation have on marriage?

14.3. Challenges Families Face

1. Explain how financial status impacts marital stability. What other factors are associated with a couple's financial status?
2. Explain why more than half of intimate partner violence goes unreported? Why are those who are abused unlikely to report the abuse?

Further Research

14.1. What Is Marriage? What Is a Family?

For more information on family development and lines of descent, visit the Library and Archives Canada "Genealogy and Family History" website to find out how to research family genealogies in Canada: http://www.bac-lac.gc.ca/eng/discover/genealogy/Pages/introduction.aspx

14.2. Variations in Family Life

For more statistics on marriage and family, see the Statistics Canada report based on the 2011 census: *Portrait of Families and Living Arrangements in Canada: Families, households and marital status, 2011 Census of Population* [PDF]: http://www12.statcan.gc.ca/census-recensement/2011/as-sa/98-312-x/98-312-x2011001-eng.pdf

14.3. Challenges Families Face

To find more information on child abuse, visit the Canadian Child Welfare Research portal: http://cwrp.ca/child-abuse-neglect

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Solutions to Section Quiz

1 A, | 2 C, | 3 C, | 4 D, | 5 B, | 6 A, | 7 D, | 8 C, | 9 A, | 10 C, | 11 D, | 12 A, | 13 C, | 14 C, | 15 B, [Return to Quiz]

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Figure 14.13. This CT scan is an example of Subdural haemorrhage caused by trauma by Glitzy queen00 (http://pt.wikipedia.org/wiki/Ficheiro:Trauma_subdural_arrow.jpg) is in the public domain (http://en.wikipedia.org/wiki/Public_domain)

Long Description

Long Description for Figure 14.6: Marriage Satisfaction through the Stages.

	Number of men who rate their marriage as "very satisfying"	Number of women who rate their marriage as "very satisfying"
Stage 1: Childless	60%	75%
Stage 2: Children 0 to 2.5	66%	84%
Stage 3: Children 2.5 to 6	60%	61%
Stage 4: Children 6 to 13	37%	30%
Stage 5: Children 13 to 20	30%	40%
Stage 6: Children begin to leave home	21%	20%
Stage 7: "Empty Nest"	49%	61%

[Return to Figure 14.6]

Long Description for Table 14.3: Reasons for not reporting spousal violence to police, by sex, 2009

Reason for not reporting spousal abuse	Percentage of men who did not report	Percentage of women who did not report
A personal matter	90%	75%
Dealt with another way	82%	77%
Not important enough	76%	64%
Didn't want to get involved with police	49%%	50%
Didn't want spouse to get arrested	41%	41%
Didn't want anyone to find out	28%	44%
Police couldn't do anything	24%	26%
Police wouldn't help	15%	12%
No confidence in the criminal justice system	10%	15%
Fear of publicity	10%	13%
Fear of spouse	3%	19%

[Return to Table 14.3]

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