21st CENTURY SOCIAL CLASS THEORY AS IT APPLIES TO MARKETING

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Within marketing, researchers and instructors have not kept up with the changes in social class theory. We examine the old social class theory still used and cited in current marketing literature and discuss the evolution and additions of cultural capital and its shift from an elite-to-mass to an omnivore-to-univore status hierarchy. In light of this shift, past consumer behavior research needs to be reviewed as well as future inclusion in empirical and theoretical research. The new social class paradigm shift explains why social class can still be applied to consumer behavior beyond market segmentation.

INTRODUCTION

Borrowing from theories in economics, anthropology, sociology, and psychology, consumer research and marketing has flourished; however, the theories borrowed from different disciplines have not been balanced. For example, research in consumer behavior has been dominated by studies of the individual (Sheth 1979). Leong (1989) reported that only 4.1 percent of the references in articles published in the *Journal of Consumer Research* between 1974 and 1988 came from sociology, the science of group behavior. During the same period, 26.8 percent of the references came from psychology. In the last decade, Wells (1993) stated that marketing should pay more attention to the sociological theories that influence consumers so that conundrums could be solved.

Social class theory is an old area of sociology that has been modified in the 21st century. Unfortunately, marketing has not caught up to this new reality. Many in the discipline still rely on past marketing research assuming the old theory of social class as current. Few have delved into the theory's foundational strengths, weaknesses, and restrictions of usage and interpretations. Even fewer have actually researched how social class theory has been evolving into something that may add new insight to past and future research.

The objectives of this article are: to educate marketing academics and practitioners in the basic history of social class theory; to identify its problems and limitations; and to introduce the 21st century's theoretical social class shift within the cultural capital concept from an elite-to-mass to an omnivore-to-univore theory. By tracking the evolution of social class theory and discussing both the positive and negative aspects, the reader can better understand sociology's theoretical shift that makes social class theory once again viable for consumer research.

SOCIAL CLASS THEORY'S PAST

Social class refers to a status hierarchy in which groups and individuals are distinguished in terms of esteem and prestige. Among the sociological theories, social class is a pillar to the marketing academician and practitioner in that it has helped segment people by lifestyle, thus helping anticipate purchasing patterns, and has been important in segmenting product-markets by consumer types (Myers and Gutman 1974; Sobel 1983; Coleman 1960, 1983; Foxall 1975; Hisrich and Peters 1974; Levy 1966; Matthews and Slocum 1969; Myers and Mount 1973; Myers *et al.* 1971; Schaninger 1981; Shimp and Yokum 1981; Slocum and

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Matthews 1970). Research suggests that consumption is distinctive across social classes by products such as furniture, clothing, and housing, by services such as health care and banking, and by switching behavior (Schaninger 1981; Gronhaug and Trapp 1988; Dawson 1989).

Social class theory began with Warner (1941) and the Yankee City series in sociology. Six social classes were identified: upper-upper, lower-upper, upper-middle, lower-middle, and lower-lower. Warner's research demonstrated that members of different social classes displayed different purchase goals and shopping behaviors. The status system crossed over into marketing in the 1950s and has been forwarded almost intact ever since.

Martineau's (1958) article provided the momentum for the 1960s (Coleman 1960; Carman 1965; Levy 1966) showing significant differences among social classes in various behaviors. Coleman cautioned that social class had been misunderstood and over-simplified. Carman was also critical of the overly simplistic manner that researchers had applied the social class concept.

Interest in this area continued into the early 1970s in the form of segmentation (Plummer 1974; Cunningham and Crissy 1972). But in the 1980s, sociology was starting to question the basic assumptions of social class theory. The critical issues were:

> Do we really have the same classes now as then, and if not, what are they?
> How do status groupings that characterize today's America affect consumer behavior?
> How do we now tell who ranks where when we study status phenomena?
> (Coleman 1983, p.265)

Corresponding to these criticisms, two approaches emerged: the Gilbert-Kahl and Coleman-Rainwater models.

Sociology's Gilbert-Kahl and Coleman-Rainwater Models

Gilbert and Kahl took the 1940s sociological view of social class and combined it with theories from political economy to frame their book, *The American Class Structure: A New Synthesis (1982)*. Their work was an updating of Kahl's previous synthesizing study, *The American Class Structure (1957)*. Kahl treated class in the United States as essentially a matter of style, social networks, and personal prestige reputation. But in 1982 a change of mind took place: "... we have reversed the direction of emphasis...we pay more attention to capitalist ownership and to the occupational division of labor as the defining variables...then treat prestige, association, and values as derivative" (p.354). The change reflected a shift in sociology's social class underpinnings.

In contrast to the political-social basis of the Gilbert-Kahl model (1982), the Coleman-Rainwater (1978) model is based on patterns of interaction among members of society. This model defined a social class as a group who shares commonality in such social characteristics as prestige, education, occupation, social skills, status aspirations, community participation, family history, recreational habits, and physical appearance. Coleman (1983) suggested two ways to use this concept. One was to divide the consuming public into four main status groups: Upper Class, Middle Class, Working Class, and Lower Class Americans. The second was more a reminder than a new idea, namely, that it must always be kept in mind that a diversity of family situations and a nearly unbelievable range in income totals are contained in each class.

Coleman also reviewed social class theory within the marketing literature and indicated that it seemed forgotten and was not up-to-date. In fact, since almost as far back as 1960, nothing theoretically new was published in consumer behavior or marketing. Most of what appeared in print merely repeated findings from the 1950s. In the 1970s and 1980s, the marketing discipline partially discovered Coleman's model but then neglected it for twenty years, assuming no theoretical growth. The result has been academics applying and teaching the old theory broadcloth.

The Old Social Class Theory and Marketing's Research Conclusions

During the last several decades more and more marketing studies have disproved social class as a valid segmenting factor. As a result consumer behaviorists suggested that other factors were significantly better than social class as predicators of purchase behavior. Researchers argued, for example, that income was the better variable over social class in many products and situations (Hisrich and Peters 1974; Mathews and Slocum 1969; Myers *et al.* 1971; Myers and Mount 1973; Slocum and Mathews 1970; Bellenger *et al.* 1976; Schaninger 1981) while others argued that income and social class be considered simultaneously (Coleman 1960; Peters 1970; Dubois and Duquesne 1993). It was also suggested that perceived risk could explain a great deal about the way information is acquired instead of social class (Hugstad *et al.* 1987).

Besides income and perceived risk, life cycle has also been the subject of investigation (Rich and Jain 1968). For example, Levy (1966) argued that "social class variations are variations of lifestyle". Follow-up studies supported the intervening effect of lifestyle in consumption and suggested that lifestyle was a more effective variable in marketing segmentation than social class (Bellenger *et al.* 1976; Miller 1978; Dawson and Wallendorf 1985; Myers and Gutman 1974; Wells and Gubar 1966; Feslon 1975; Plummer 1971).

Likewise, consumer behaviorists kept finding the disadvantages of using social class as a variable for understanding consumer choice in market segmentation. The general consensus became that the application of social class theory works in a few situations but is not generalizable. As a result the marketing literature on social class and patronage behaviors has not produced any unified theoretical linkages (Dawson and Wallendorf 1985). The new consensus is that social class is not a valid concept for consumption and that the patterns are no longer consequential to class reproduction. Unfortunately, the marketing consensus is based on an old, out dated theory.

It is true that the old social class theory is no longer reproduced through distinctive patterns of consumption. Alternatively, this relationship is obscured when old theorizing is used to analyze the new social formation. More specifically, all these deficiencies and problems in applying social class theory to marketing were generated in the outdated understanding of cultural capital.

SOCIOLOGY'S PARADIGM SHIFT OF CULTURAL PREFERENCES

Social life has three distinct elements: economic (financial), social (relationships, organizational affiliations, and networks) and cultural (distinctive tastes, skills, knowledge, and practices). These elements compete for status or symbolic capital (Carman 1965; Bourdieu 1979). Sociology generally agrees that class is a power-based three dimensional concept. In addition to the economic and political capitals, cultural capital is a self-perpetuating sub-culture that differs in the value placed on education, solidarity of the family, religious involvement, media exposure, recreational activities, and others. More specifically, cultural capital is as Martineau (1957) states;

> the friend we choose, the neighborhoods we live in, the way we spend and save our money, the educational plans we have for our children are determined in large degree along social class lines. A rich man is not just a poor man with more money. He probably has different church membership, and many different notions of right and wrong, all largely stemming from social class differentials. With its disciplinary pressures of approval and disapproval, belonging

> versus ostracism, social class is a major factor shaping the individual's style of life (p. 166-7).

The concept of cultural capital has been used in sociology to study the impact of cultural reproduction on social reproduction. Sociologists developed a view of status groups ranked in terms of their appreciation of the arts and letters, their styles of clothes and language, and their use of leisure time (cultural capital). They discovered the close association between such status rankings and ranking by stratification variables including income, occupation, and years of schooling (Goffman 1951; Warner 1953; Form and Stone 1957; Gans 1974, 1985). Ethnographic studies of cultural status indicators have appeared within the American elite (Baltzell 1964; Domhoff 1974; Sennett and Cobb 1973; LeMasters 1975; Halle 1984; Fantasia 1988) as well as in occupational groups (Hugees 1958; Bensman and Lilienfeld 1991). Finally, cultural capital has been associated with symbolic forms in maintaining class socialization and status hierarchy (Bourdieu 1984, 1985; Bourdieu 1977; DiMaggio and Mohr 1985; Lamont and Lareau 1988).

Cultural capital is relevant to social consumption and marketing research in that consumer goods have a significance that goes beyond their utilitarian character and commercial value. This significance rests largely in their ability to carry and communicate cultural meaning (Douglas and Isherwood 1979; Sahlins 1976). Cultural meaning flows continually between its locations in the social world, aided by the collective and individual efforts of designers, producers, advertisers, and consumers. There is a traditional trajectory to this movement in that cultural meaning is drawn from a culturally constituted world and transferred to consumer goods and then drawn from the object and transferred to an individual consumer (McCracken 1986).

During the last two decades, consumer behaviorists have made the cultural significance of consumer goods the focus of renewed academic study (Belk 1982; Felson 1975; Furby 1978; Hirschman 1980; Holman 1980; Levy 1978; McCracken 1986; Prown 1984). One of the most relevant to marketing is the elite-to-mass cultural capital theory of Bourdieu.

In his book *Distinction* (1979), Bourdieu argues that cultural capital secures the respect of others through the consumption of objects that are ideationally difficult and can be consumed only by those few who have acquired the ability to do so. A foundational premise of the_theory is that categories of cultural goods and activities vary by the level of cultural capital required to successfully consume them (i.e., to fully enjoy the act of consuming).

Based on Bourdieu's cultural capital theory, the standard view of stratification in the United States is that at the top there is an educated and discerning elite with well-refined tastes and at the bottom an ignorant and stimulus-seeking mass (Brooks 1958; Goffman 1951; Glenn 1969; Shils 1961; Sobel 1983).

Therefore, the elite-to-mass portion of social class theory makes clear predictions about the arts and leisure choices of groups at different levels of the status hierarchy:

> Those at the top will choose the fine arts and related leisure activities while shunning others. Those near the middle will choose derivative works and activities, while those groups at the bottom will shun the fine arts and indiscriminately choose sensational and mass-mediated entertainments (Peterson 1992, p. 246).

This distinction directly leads to different purchase behaviors with the general conclusion that social class is a salient dimension of store image and that patronage is the result of consumers seeking congruence between self and store image (Martineau 1958; Levy 1966). Others confirmed that department and specialty store patrons primarily are from upper social classes (Rich and Jain 1968; Hirschman 1980), while discount stores tend to attract lower class consumers (Rich and Jain 1968). This pattern was more distinctive for purchases such as furniture or clothing (Schaninger 1981) that evoke higher social risk (Prasad 1975). In addition, in comparing higher and lower social classes, the former were found to spend more on books and education, but less on activities like baseball game attendance (Smelser 1976).

On the other hand, many aspects of consumer behavior show great discrepancy from social class' cultural capital prediction. For example, Rich and Jain (1968) examined women's fashion shopping behaviors and found:

- Fashion plays an important part in the lives of all women regardless of class.
- Women in various social classes seemed to find newspaper ads helpful to about the same degree.
- Women in various social classes showed no significant difference in the influence of friends on shopping.
- Most of women enjoyed shopping regardless of their social class although the reasons for shopping vary.

They questioned the usefulness of social class concepts in understanding consumer behavior because of recent changes in income, education, leisure time, movement to suburbia, and other factors. Numerous studies have indirectly questioned the old social class theory, and Bourdies' elite-to-mass portion. The central question was: Does Bourdieu's theory apply to contemporary United States? Peterson and Simkus' (1992) suggested the shift on cultural capital from elite-to-mass to omnivore-to-univore status hierarchy was one of the best answers to this problem.

FROM ELITE-MASS TO THE OMNIVORE-UNIVORE THEORY

Peterson and Simkus' (1992) meticulously disassembled social class theory to show its problems and suggested solutions. Based on Bourdieu (1984, 1985) and Wright's (1985) nature and structure of social classes, they defined nineteen distinct groups of occupations: higher cultural, lower cultural, artists, higher technical, lower technical, higher managerial, lower managerial, higher sales, lower sales, clerical, skilled manual, semi-skilled, semi-skilled, laborers, skilled service, farmers, and farm laborers. The type of music liked best was chosen as the indicator of aesthetic taste.

The log-multiplicative technique by Goodman (1985) and elaborated by Becker and Clogg (1989) was used to simultaneously rank the occupational groups by types of music. According to the old theory, high status groups should have been exclusive in their taste and not like the non-elite group's music, but the empirical results were contrary. Peterson's study (1992, p. 248) found the higher status occupational groups tended to show high rates of participation in non-elite activities. Others (DiMaggio 1987; DiMaggio and Useem 1978) began to use the omnivore concept to explain the theory shift.

Because status is gained by knowing about, and participating in many if not all forms of activities, "the term 'omnivore' seemed appropriate for those at the top of the emerging status hierarchy," (Peterson 1992). But Peterson did not believe the findings meant the U.S. was becoming a more egalitarian society or that leisure activities and tastes in music had lost their efficacy as status markers for the elite. Instead, he proposed some tentative reasons for the emergence of the omnivore:

> The fundamental humanist belief in the moral superiority of fine culture was sharply contradicted by the realities of the two World Wars.
>
> Technical education, to an important degree, has displaced birth and cultural breeding as requisite for elite status.
>
> Many mobile persons of diverse traditions value the customs of their past. (1992, p. 255)

At the same time other forces had operated to tame and make respectable ethic and working-class cultural expressions. These forces included liberal education, the democratic effort to find something good in the traditions of all groups, the exposure via the mass media of folk and ethnic-based customs, food, and music. As a result, the image of the taste-exclusive highbrow, along with the ranking from snob to slob had become obsolete suggesting an alternative explanation of the elite-to-mass status hierarchy.

Since the top of the pyramid was conjectured to be the omnivore, the bottom of the pyramid was also changed. According to Peterson, "the occupational groups near the bottom are less likely to spend more hours watching television and tend to have a lower incidence of all leisure activities." (1992, p. 253). Therefore, the most descriptive appellation for those near the base of the pyramid would seem to be 'univore'. Unlike the high status 'omnivore', members of this group tend to be actively involved in just one, or at best a few, alternative aesthetic traditions. He suggested that the elite-to-mass was once correct but had become inaccurate in U.S. society. Using comparable 1982 and 1992 surveys, Peterson and Kern (1996) tested the change in tastes and found that highbrows are more omnivorous than others and that they become increasingly omnivorous over time. Finally, they suggested social changes as five factors: structural change, value change, art-world change, generational politics, and status-group politics.

Erickson (1996) argued that Bouidieu's social class theory was lacking because it was based on the French and not Americans. Also, Holt (1998) suggested "the theory should be reformulated to focus on consumption practices rather than consumption objects and on mass rather than high culture." (p. 1). Sociologists concluded that in America, people who have high cultural status occupations tend to have wide interests on cultural capital, while people who have low cultural status occupations have narrow interests on the cultural capital dimension.

OMNIVORE-TO-UNIVORE'S EFFECT ON CONSUMER RESEARCH

Although the theory shift has been a hot topic in sociology for almost two decades, marketing and consumer behaviorists have not incorporated this change. In fact, no research has emerged in the marketing literature integrating the social class' cultural capital shift from an elite-to-mass status hierarchy to an omnivore-to-univore status hierarchy. We suggest that marketing adopt the omnivore-to-univore segment in that it better explains and predicts some of the past, present, and future empirical research in consumer behavior. By applying omnivore-to-univore to marketing, social class becomes a better predicator, or at least as relevant, as income and becomes a better predicator over lifestyle.

Social class research in consumer behavior has a long history, but the contributions have been minimal in marketing. This is partially because the dominant theory in marketing is both inconsistent with major trends in American society and incompatible with the socialization perspective (Shimp and Yokum 1981). Social class research in marketing tends to overemphasize the economic dimension while overlooking the cultural dimension, a primary factor to consumer behavior. Marketers have not realized the theoretical changes and have based decisions and research on an old, inappropriate theory.

According to our research, this review illuminates the key concepts for the uninitiated while clarifying to the researcher the new reality. Despite the change and development of social class theory in sociology, social class theory in marketing has not been updated since the 1960s. Instead, marketing researchers (consumer research) have kept disproving the validity of social class theory and proposing other factors, such as income, perceived risk, and life cycle, as better predictors in segmenting and predicting consumer behaviors. By understanding the cultural capital dimension we change the view of social class theory from an elite-to-mass to an omnivore-to-univore status hierarchy, thus negating the disadvantages found in consumer research in recent decades. This shift from an elite-to-mass to an omnivore-to-univore status hierarchy significantly influences the marketing discipline. By understanding the current sociological literature, marketing and consumer research not only can reconcile past application controversies but can also see the theory as a more valid factor in the current research.

In addition to the theoretical contribution, understanding and utilizing this shift can benefit practitioners. For example, according to the omnivore-to-univore view of social class theory, consumers in the upper level of social class are different from what was believed and accepted by product/services. Therefore, products considered as consumptions by lower level social classes may also be targeted to upper level social class consumers as well. Other elements of marketing can also be reconsidered. For example, with the theory change upper level consumers should accept both high and low priced products, visit both elegant and discount stores, and can be accessed through traditionally different assumed promotional strategies. By comparing both views practitioners may discover more opportunities to target different consumer classes with the same medium and strategy.

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