

## **Class or Gradient of Class? The false “demonstration effect”\***

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Most of the work about the middle class acknowledges how difficult it is to define it using objective criteria. However, this work also tends to provide an *ad hoc* operative definition in order to introduce empirical findings about how the middle class is today or how it was in the past. The mere existence of the middle class seems to be an obvious fact that does not require evidence.

In fact, among the research on the middle class, there is a demonstration *effect* that presents empirical evidence in order to highlight differences in “lifestyles” between the middle class and lower sectors. In a capitalist society there is some correlation between occupation and income, to the extent that one can function as a “proxy” of the other. Furthermore, income level strongly relates to other indicators such as level of education, health care coverage, etc. This way, if a certain group of people performs unskilled manual labor, we can rightly assume that their income and education levels will be comparatively low, that they won’t have private health care, etc. The same could be said if the indicator available was income level. Manual labor is less well-paid; thus, we can expect a whole range of differences in the “lifestyles” between a construction worker and a doctor, a professor or a small manufacturer. These differences will seem to confirm that we are in the presence of two classes. However, the sample produces a deceptive effect that, even if obvious, has not received enough attention.

I will use a recent study conducted by the Economics Department of the Massachusetts Institute of Technology (MIT) about the characteristics of the “global middle class” - a class whose existence is recognized by many scholars today - as an example. The study analyzes information about the living conditions and consumption habits of the population in thirteen developing countries: occupation, income and education levels, access to health care, housing, food expenses, leisure, etc. In this case, the researchers define class based on income level, more specifically on consumption *per capita* (if they had chosen type of occupation, the results would have been similar). They arbitrarily named “middle class” all those households located between the twentieth and eightieth decile on the consumption scale - that is, households with expenses *per capita* per day of 2 to 4 dollars or 6 to 10 dollars, depending on the country. Any expenditure below or above those values, corresponded to the low and high class respectively. In spite of great cultural differences between the countries in the sample - Mexico, Pakistan, and Cote d’Ivoire among others - the authors of the research concluded that there were certain shared patterns that made the “middle class” different from other classes. [1]

It follows from this research that there is empirical evidence for both a national and global “middle class”. This “middle class” has a specific “lifestyle”, which not only includes higher rates of consumption or better housing than the poor - which seems pretty obvious - but also, some shared “subjective” characteristics such as the tendency to have fewer kids and to extend children’s education. For instance, the following data about consumption and leisure confirms the existence of differences between classes:

**Percentage of households with leisure expenditures (festivals). Mexico, urban population according to class.**

Class	Average
Low Class	2.0%
Middle Class	19.23%
High Class	>35.3%

These data - and other similar data - seem to show that the differences between classes might point to separate social spaces. According to its leisure expenditures, the Mexican middle class seems to be quite far from the low class, but at the same time far from the high class, since it consumes less of these goods

However, if we consider more disaggregated data, the picture is more complex:

**Percentage of households with leisure expenditures (festivals). Mexico, urban population according to consumption level and class. [2]**

Class	Expenditure per capita (US\$)	Average according to consumption level	Average according to class
Low Class	US\$1	2%	2%
Middle Class	US\$2	5.2%	19.23%
	US\$2 – U\$4	17.2%	
	US\$6 – U\$10	35.3%	
High Class	>US\$10	>35.3%	>35.3%

The table shows a *constant gradient* in the acquisition of cultural goods according to consumption levels. If we had even more disaggregated data we will see that there are not abrupt differentiations that “prove” per se the existence of separate social worlds. The following table shows a hypothetical disaggregation of the data of this research, and the resulting clustering of the averages, to show other alternative possible classes to those used by the authors:

**Percentages of households with leisure expenditures (festivals). Hypothetical disaggregation based on the previous table and alternative class clustering.**

Expenditure per capita	Average according to	Average according to class
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	consumption level	
US\$1	2%	Precarious Working Class
US\$2	5.2%	
US\$3	12.5%	Stable Working Class
US\$4	20.0%	
US\$5	27.2%	
US\$6 –7	30.2%	Petit Bourgeoisie
US\$8 –10	37.5%	
US\$10 – 20	45.3%	
US\$21 – 40	59.7%	
US\$41 – 100	70.0%	Services Class
>US\$100	>70.0%	High Class
		>70.00%

The data shows that there are not significant differences between culture consumption between classes. It also shows that there is a *gradient of class* that correlates with the level of consumption of these kinds of goods. In other words, the greater the consumption power, the more people attend festivals in Mexico. At the same time, we cannot infer from this data the existence of three classes (and by no means could we know what classes they would be). Any attempt to divide the data, whether that would result in two, four or seven classes, tweaking the limits between them as we please, would find that the averages per group change substantially. However, it does not prove the existence of any class but instead shows the effect of a false “demonstration effect”. That is, the result of arranging a real gradient of class according to a preconceived class structure. The data itself neither shows the existence of any one class, nor it is enough to identify a “middle class”. [3]

Remarkably, much of the academic research about the middle class uses this kind of methodology. It *a priori* assumes the existence of a middle class that groups together retail employees, shopkeepers and lawyers, and then it “measures” or analyzes certain behavior - endogamy, certain political ideas, number of children, stance about sexual diversity, etc. - to conclude that all these different sectors share something that distinguishes them from those who are above and below according to a class line arbitrarily drawn. The “demonstration effect” of such an *a priori* classification obscures the possibility that the political ideas of a retail employee might be closer to those of a qualified manual worker than to those of a lawyer in a successful law firm. Moreover, marriage patterns might be “endogamic”, but upon a closer look, it may be that these endogamic patterns happen within closer circles, since for the lawyer, the probability of marrying the daughter of a shopkeeper is perhaps no greater than that of marrying the

daughter of a skilled worker. Furthermore, much of the research that uses an *a priori* definition of “middle class” focuses exclusively on the professional category without including examples from other categories. Thus, there seems to be some shared characteristics that create a sense of wholeness to the class, while in fact, these are *non-specific* characteristics (that is, we could also find them in the lower and/or higher classes).

\* Excerpt from *Middle classes: new approaches in sociology, history and anthropology*, Ezequiel Adamovsky, Sergio E. Visacovsky & Patricia Beatriz Vargas (eds.), Buenos Aires, Ariel, 2014. Reproduced with permission of authors.

[1] Abhijit Banerjee & Esther Duflo: “What is Middle Class About the Middle Classes Around the World?” MIT Department of Economics Working Paper No. 07-29, 2007.

[2] Ibid, appendix, table 4.

[3] A recent sociological research conducted in Great Britain showed that the gradients of class do not justify the divisions and clustering of classes that we know (identifying the “middle class” as one of the three key ones). It concluded that the division in three classes is outdated and that today, we can identify at least seven classes; cf. Mike Savage, et al.: “A New Model of Social Class: Findings from the BBC’s Great British Class Survey Experiment”, *Sociology*, vol. 47, no. 2, 2013, pp. 219–250.