

ABSTRACT

This paper reviews the sex-role self-concept measures developed before and after the 1970s used in marketing and consumer behavior research. The three most commonly used measures have been: CPI-Fe in studies before 1971; PAQ between 1976-1978; BSRI from 1978-present. Marketing studies have generally found that (1) biological sex is more influential than psychological sex traits, and (2) high masculinity is more influential than femininity traits. Socio-economic changes during the 1970s, such as women's participation in the labor force and the shift from a manufacturing to a service economy, suggest future directions for gender research in the marketing areas of product, price, distribution, and promotion.

Sex-Role Self-Concept Measures and Marketing: A Research Note

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Researchers in the social sciences have studied the relationships between biological sex, psychological gender traits, and socio-economic sex-roles in order to learn more about the interaction of physiology, personality, and environmental factors in individuals. In the past twenty years, and especially since 1974, this research area has captured the interest of marketers bent on exploring the possible usefulness of sexual identity as a dimension of consumer behavior. Market-

ing research has produced a body of provocative, although often conflicting, findings in its history of applied gender research.

This paper presents a short review of the development of self-perceived sex-role measures and their application in marketing and consumer behavior literature. The studies considered are limited to those which have included measures of sex-role self-concepts. The purpose of this paper is to provide a historical review of the application of this research in marketing, assess its present status, and suggest future directions. There are four sections:

1. Review of self-perceived sex-role research pre- and post-1970s
2. Applications in marketing/consumer behavior
3. Present research status
4. Marketing implications of socio-economic change and suggested future research directions

Self-Perceived Sex-Role Research Pre- and Post-1970s

The influence of biological sex-dominated sex-role research prior to the 1970s assumed that biological sex was the major determinant of sex-related behavior, and that "healthy" individuals were those who conformed to the sex-role appropriate to their gender and manifested only those traits socially approved for that gender (Constantinople, 1973; O'Connor, Mann, and Bardwick, 1978; Robinson and Green, 1981). Masculinity and femininity were assumed to be unidimensional bipolar opposites on one continuum, correlated with biological sex, and constrained by concepts of societally determined stereotypical "correct" behaviors for men (masculine) and women (feminine).

The dynamic changes which began to take place in American culture in the 1960s affected sex-role stereotyping, and called these traditional assumptions into question (Bem, 1974, 1975, 1977; Bem, Martyna, and Watson, 1976; Robinson and Green, 1981). The women's liberation movement and the entry of women into institutions of higher learning and the workforce led to the observation that sex roles, biological sex, and sex-related personality traits may not necessarily be either immutably fixed or identical. Once external sex roles were questioned, as a result of women becoming active participants in the world outside the home and, to a lesser extent, men becoming partners in homemaking and childrearing, the status of interior sex trait polarities also had to be reexamined.

Sandra Lipsitz Bem developed a new theory of psychological, rather than biological, sex traits. She conceptualized masculinity and

femininity as separate, orthogonal constructs, not biologically based, and able to coexist in varying degrees within the same individual (1974, 1975). Her theory is based on the hypothesis that individuals may be “*both* masculine and feminine, *both* assertive and yielding, *both* instrumental and expressive—depending upon the situational appropriateness of these various behaviors” (1974, p. 155). The individual who shows both traits is labeled “androgynous,” and judged “healthier” because s/he can adapt to a wide variety of situations. This flexibility is a result of freedom from rigidly sex-typed behavioral constraints. The Bem Sex Role Inventory (BSRI, 1974), a scale developed to operationalize this theory, will be described in the following section.

Applied Gender Research in Marketing/Consumer Behavior

Marketers have shown interest in sex-role self-concepts because of their implied relationship to product imagery (Sirgy, 1982). Self-concept theory generally refers to the study of an individual’s global self-attitude: the attitude s/he holds towards him/herself as an object viewed in actual, ideal, and social terms (Sirgy, 1982). An individual’s self-assessment as masculine or feminine can be interpreted as only one among many dimensions of self-concept, some of which are not sex-related (Locksley and Colten, 1979), or as a virtual equivalent to the individual’s total self-concept (Gentry and Doering, 1977; Gentry, Doering, and O’Brien, 1978; Golden, Allison, and Clee, 1979). For marketing purposes, sexual self-concept is thought to be particularly relevant in these areas: product perceptions as masculine/feminine, stereotypical images of product users (see Sirgy, 1982), and advertising stereotypes of spokesperson sex-role (see e.g., Whipple and Courtney, 1980).

Three scales have been most commonly used to measure the self-concept domain of sex roles in marketing literature. In order of chronological development, they are the California Psychological Inventory—Femininity Scale (CPI—FE) published in 1952 (Gough), the Bem Sex Role Inventory (BSRI) published in 1974 (Bem), and the Personality Attributes Questionnaire (PAQ), also published in 1974 (Spence, Helmreich, and Stapp).

The CPI—Fe was designed to measure the masculinity or femininity of respondents in terms of “favorable and positive” personality traits. The CPI—Fe treats masculinity and femininity as bipolar opposites on one continuum. It is a 38-item subscale of the California Psychological Inventory (Gough, 1957), in which respondents are asked whether self-descriptive statements are true or false. Some statements concern stereotypical role-preferences, such as “I would

like to be a nurse," while others deal with emotional or interpersonal relations, such as "I get very tense and anxious when I think other people are disapproving of me." By 1966 this scale was commonly used as a measure of a continuum of psychological femininity (Megargee, 1972).

CPI-Fe was used alone in four early marketing studies (Aiken, 1963; Fry, 1971; Morris and Cundiff, 1971; Vitz and Johnston, 1965). Before 1971, marketing researchers followed the general tradition of viewing sex roles as a bipolar construct (Aiken, 1963; Fry, 1971; Morris and Cundiff, 1971; Vitz and Johnston, 1965). The findings were not uniform (see Table 1): three studies found product-related behavior to be consistent with sex-role self-concept (Aiken, 1963; Fry, 1971; Vitz and Johnston, 1965), but one did not (Morris and Cundiff, 1971).

When CPI-Fe was used with the PAQ in two later studies (Gentry and Doering, 1977; Gentry, Doering, and O'Brien, 1978), biological sex was found to be as good an explanatory variable, if not a better one, than sex-role self-concept for product, brand, media, and perceptual choices. CPI-Fe has not been used alone or in combinations in marketing studies published since 1978.

The Bem Sex Role Inventory (BSRI, 1974) provided research in psychology with a new theoretical framework for measuring, scoring, and combining traits judged to be masculine or feminine self-concepts. It is a self-descriptive survey instrument relying on a seven-point true-untrue scale to measure respondents' identification with sixty characteristic qualities expressed as adjectives or adjective phrases. These qualities are socially desirable personality descriptors: Forty are sex-related, and twenty are sex-neutral. A respondent's identification with the sex-related qualities provides insight into his/her self-perception as feminine or masculine. The BSRI was originally scored using the *Student's t*-ratio of the difference between a respondent's masculine and feminine scores, excluding the twenty-item nongender subscale, to assess the degree of sex-role stereotyping (Bem, 1974; 1975; 1977). Respondents were then categorized in a three-group typology: feminine (high femininity, low masculinity); masculine (high masculinity, low femininity); androgynous (high/low masculinity, AND high/low femininity).

Ben later revised her own typology to distinguish between the androgynous and undifferentiated, and she recategorized respondents into four groups:

- Feminine (High Femininity, Low Masculinity)
- Masculine (High Masculinity, Low Femininity)
- Androgynous (High Masculinity, High Femininity)
- Undifferentiated (Low Masculinity, Low Femininity)

TABLE I

Studies Using Sex-Role Self-Concept Measures

Study	Sample ^a	Test	Product	Findings
Aiken 1963	300F	CPI—	Women's clothing	Behavior consistent with sex-role self-image: significant correlation between sex roles and some dress "clusters."
Vitz Johnston 1965	40 M 40 F	CPI—F MMPI	Cigarettes	Behavior consistent with sex-role self-image: significant correlation between masculine role and masculine-rated cigarette brand.
Morris Cundiff 1971	223 M	CPI—F	Hair Spray	Behavior not consistent with sex-role self- image: high feminine/high anxiety men reject feminine-rated hair spray.
Fry 1971	216 M & F, Nonstudent	CPI—F	Cigarettes	Behavior consistent with sex-role self-image: high feminine men smoke feminine-rated cigar- ettes.
Tucker 1976	13 M 11 F	PAQ	Attitude to Women	Discrepant behavior: males and females behave in ways discrepant with centrally held attitudes to women.
Burns 1977	81 F Nonstudent	PAQ	Stereo, TV auto, sofa dinette	High masculine wives have more dominant in- fluence on family decision-making in some product areas.
Gentry 1977	100 M	CPI—F	Leisure products activities	Sex is better explanatory variable than sex-role self-image for product use, brand choice, and media use.
Gentry et al. 1978	100 M 100 F	CPI—F PAQ	Leisure products activities	Sex is better explanatory variable than sex-role self-image for association between product use and perception.

TABLE 1 (continued)

Studies Using Sex-Role Self-Concept Measures

Golden et al. 1979	307 MF	BSRI—LONG	Knife underwear, key ring, hair spray, cufflinks	Sex is more influential in product perception than sex-role self-concept. Sex role self-concept is more important for feminine product perception than masculine.
Allison et al. 1980	174 M 133 F	BSRI—LONG	24 products	Sex is better predictor of product perception than sex-role self-concept. Product sex-typing is based on sex, product, and interaction between sex and product.
Martin Roberts 1983	125 MF	BSRI—LONG	Attitude to women as restaurant owners	Sex, traditional/contemporary values, and sex roles lead to devaluation of women as entrepreneurs. Persistence of sex stereotyping in negative attitudes towards women as business owners.
Gentry Haley 1984	168 MF	PAQ	Recall of print ads for masculine feminine, neutral product	Sex may be better predictor than sex-role self-concept for ad recall. Within sex processing of information differs more than between-sex as a result of sex-role self-concept.
Kahle Homer 1985	84 M 55 F	BSRI—LONG	Food for lunch	Sex differentiates lunch food choices and amounts of food eaten.
Coughlin O'Connor 1985	420 MF Nonstudent	BSRI—LONG	Attitude to Women's role in print ads	High masculine sex-role self-concept explains differences not explained by sex in reaction to women's roles in ads.
Barak Stern 1986	614 F Nonstudent	BSRI—SHORT	Age and demography, psychogr. behavior variables	Masculinity index seems to be self-assurance measure, rather than sex-role self-concept trait index. Positive relationship between masculinity and femininity indexes in age cohorts useful for consumer behavior.

^aAll samples are students except where noted.

Most of the recent BSRI based sex research (e.g., Bem 1977; Bem, Martyna, and Watson, 1976; Bem, 1979; Robinson and Green, 1981; Taylor and Hall, 1982) has used the four-group typology, with particular emphasis on androgyny, hailed as a multidimensional contemporary solution to problems implicit in older bipolar assumptions. Sex traits could now be considered blendable constructs, coexisting in the same individual and not dependent on biological sex.

The long version of the BSRI has been used in five marketing studies (Golden, Allison, and Clee, 1979; Allison, Golden, Mullet, and Coogan, 1980; Martin and Roberts, 1983; Kahle and Homer, 1985; Coughlin and O'Connor, 1985). A shortened version has been used in one study (Barak and Stern, 1986). It has never been used in combination with other sex-role self-concept measures, and has been used in marketing research only since 1979.

A third scale, the PAQ, (Spence, Helmreich, and Stapp, 1974; 1975) was first developed to remedy the deficiency in Bem's scoring, which originally failed to distinguish between those with high masculinity/high femininity ("Androgynous") and those with low masculinity/low femininity ("Undifferentiated"). The version used by marketers (Spence, Helmreich, and Stapp, 1974; 1975) is a 55-item self-report survey instrument using a 5-point scale to measure respondents' identification of themselves and a "typical college male/female" in terms of adjectives and phrases describing socially desirable clusters of sex-related personality traits.

Even though Bem accepted the need to revise her own typology (1977), there was an interim period when marketing research used the PAQ: 1976-1978 (Burns, 1977; Gentry and Doering, 1977; Gentry, Doering, and O'Brien, 1978; Tucker, 1976). Since 1978, only one study has used the PAQ (Gentry and Haley, 1984).

The relationship between gender, sex roles, and self-concept has thus been studied in marketing and consumer behavior literature only to a limited extent, in three periods distinguishable by the different measures used:

Early:	1963-1971	CPI-Fe
Interim:	1976-1978	PAQ
Current:	1979-present	BSRI-Long, BSRI-Short

Additionally, the total number of empirical studies is fifteen, five of which are the work primarily of two groups of researchers (Gentry and Doering, 1977; Gentry, Doering, and O'Brien, 1978; Gentry and Haley, 1984; Allison, Golden, Mullet, and Coogan, 1980; Golden, Allison, and Clee, 1979).

Present Status of Research

The marketing studies of the past decade have generally found that:

1. High masculinity explains more than typological combinations in terms of family decision-making, reactions to women's roles in advertisements, and a variety of consumer behavior variables (Barak and Stern, 1986; Burns, 1977; Coughlin and O'Connor, 1985).

The BSRI trait index of femininity has not been found useful for marketing purposes, since it seems relatively independent of consumer behavior variables (Barak and Stern, 1986). Androgyny shows few differences from masculinity, since masculinity appears to be the "active" ingredient (Adams and Sherer, 1982). The androgynous individual does differ from the feminine one, but the difference seems to relate less to the presence of high femininity than to the presence of high masculinity (Barak and Stern, 1986; Taylor and Hall, 1982).

It is now thought that a "main effect" in both psychological and marketing studies may be the dominance of the masculinity trait (Adams and Sherer, 1982; Antill and Cunningham, 1979; Gentry, Doering, and O'Brien 1978; Jones, Chernovitz, and Hansson, 1978; Lee and Scheurer, 1983; Taylor and Hall, 1982). Although the implicit assumption that masculinity and femininity are equally desirable infuses androgyny theory (Lenney, 1979), social and cultural history do not bear this out. Masculinity and the male role have long been thought to be more highly valued in most cultures studied (Bernard, 1980; Rosenkrantz et al., 1968). Not only do masculinity and femininity seem to differ in social valuation, but also they appear to differ qualitatively in terms of an individual's self-judgment (Bernard, 1980). Masculine traits seem to be the ones that are reinforced positively in this culture for both sexes, and feminine traits tend to be more uniformly avoided by men than masculine ones by women. The power of masculinity, not androgyny, appears to be the source of psychological strength in both interpersonal and achievement domains for individuals in American society (Orlofsky and Stake, 1981).

2. Biological sex is at least as good an explanatory variable as, if not better than, sex-role self-concept, for product use, brand choice, media use, product perception, product sex-typing, attitudes towards women

business owners, and advertising recall (Allison, Golden, Mullet, and Coogan, 1980; Gentry and Doering, 1977; Gentry, Doering, and O'Brien, 1978; Gentry and Haley, 1984; Golden, Allison, and Clee, 1979; Kahle and Homer, 1985; Martin and Roberts, 1983). Interestingly, an individual's biological sex is also thought to be a far stronger predictor of global judgments about ideal as well as actual personality characteristics than psychological traits in general (McPherson and Spet-rino, 1983).

The apparent strength of biological sex as a more significant influence than psychosexual gender concepts across a wide range of product and attitudinal variables has led to a call for abandonment of all gender-role research in marketing as unproductive and probably pointless (Roberts, 1984). However, in spite of the problems associated with sex-role research, and the lack of a coherent body of findings in marketing literature, it may be premature to leave the field after less than a decade's worth of empirical research with any one instrument.

Marketing Implications and Future Research

It may be especially premature to bury the entire area of gender research in marketing on the basis of problematical findings of the preceding decade. The postindustrial 1970s have witnessed rapid and turbulent socio-economic change, whose full force is only now being felt. The impact of this change on sex roles and traits is likely to continue, and the need seems to be for new directions research can take, rather than abandonment of the field. Of course, it has been particularly difficult to measure change because of the very rapidity with which it has been occurring.

The most significant sex-role-related shift in society has been in employment patterns for women: women have moved from acting primarily as economic consumers to producers AND consumers as well: 53.6 percent of the female population in 1984 was in the civilian labor force, up from 43.3 percent in 1970 (U.S. Department of Commerce, 1985). Concomitantly, men have also shifted from primarily producer roles to producer and consumer status: as more women enter the work force and dual career families become commonplace, both partners share in purchase activities to a greater extent than when only one spouse worked outside the home. Thus, role changes begun in the 1960s have only now reached critical mass,

since the number of women participating in the labor force first passed the majority level in the early 1980s.

Coincident with this employment shift has been the growth in the service economy, now responsible for over 70 percent of the GNP and nine out of every ten new jobs generated. Gender impacts appear to be implicit in this change as well (Stern, 1987), since services are also the primary employer of women: 80 percent of women working today are in the "Pink Collar" and "White Collar" labor force (Fan-Fox and Hesse-Biber, 1984). Further, the majority of women in managerial, professional, and entrepreneurial careers are found in services as well: in 1982, 52 percent of women executives were employed by services firms (Forbes and Piercy, 1983), and 75 percent of women entrepreneurs were concentrated in services areas, particularly retail (Bowen and Hisrich, 1986). At present, the shrinking industrial base of the economy remains male-dominant, since women rarely seek employment in mining, manufacturing, and agriculture, while the growing nonmanufacturing sector becomes considerably more sex-integrated.

Both of these changes have gender-related marketing implications, and point to areas where future research is needed. Marketers can benefit from research on product, pricing, distribution, and promotion which takes into account the ongoing impact of societal change on sex roles, traits, and self-concepts.

Product

It seems fair to state that gender research into the product area of *services* as distinct from *goods* has barely begun. Prior research deals primarily with consumer goods: only two self-concept studies have considered services, and those have dealt with leisure activities alone (Barak and Stern, 1986; Gentry and Doering, 1979). Despite the importance of sex-typed product images for marketing (see Sirgy, 1982), there has been no research on the sex-typing of services. Since services are widely regarded as different from goods in many ways (Berry, 1980; Shostack, 1977), inferences about the gendering of services requires separate study. While some services such as beauty salons or automotive repair shops seem sex-typed on the basis of habitual service user, others such as dental care or public transit are considerably more difficult to classify. Answers to the question of whether services acquire gender in the same ways as goods do, or, indeed, whether services acquire gender at all, would help marketers in new services development, accurate consumer targeting, and competitive positioning.

There is not much known about the relationship between pricing strategy and new male/female roles as both consumers and producers. The relationship is probably quite complex because a wage gap still exists between men's and women's earnings: in 1984, women earned approximately 64 percent of what men did (Francesse, 1985). Thus, the earning capacity of women has not caught up with their new economic roles as wage earners. In this sense, woman and men as producers of the prime consumer necessity—income—are not precisely comparable. The interaction between actual social role shifts, self-perceived sexual identity, and income constraints is significant in certain product markets. Luxury furs, for example, have been repositioned. Instead of using high prices and targeting to men as purchasers of furs for women, the strategy of mass marketers such as Fred the Furrier has been to price affordably and target to working women buying for themselves. Research into the strategic pricing of products, especially in the area of psychological pricing and price/quality attributes, would be valuable for targeting to different consumer segments in many product categories.

Distribution

The area of channel strategy seems related to gender aspects implicit in situation segmentation. The situational interrelationship between personality traits, time, and role enactment may be critical for purchase acts (Stern, 1987). The need to study situational role variability was suggested in sex-role research (Lenney, 1979); likewise, situational segmentation has been discussed in marketing (Dickson, 1982). However, the possible relationship between individual role shifts in the course of time and purchase behavior has not been explored.

The interaction between time pressure and sex-role enactment in purchase situations particularly relates to retailing of consumer goods. Consumer demand for specific "place" attributes such as convenience, atmosphere, and depth of choice seems related to shifting sex roles that individuals enact, often in rapid succession, in daily life. Shopping behavior appears to vary depending on the consumer's situational role at that time. For example, the male consumer shopping during the working day may exhibit different traits and demand different retail attributes than that same consumer shopping recreationally on a weekend. Research into the relationship between gender-role enactment, sex-related personality traits, and time/money constraints may provide strategic information

to distributors competing for consumer dollars in a disinflationary economy where the utility of money is less salient than that of time.

Promotion

The area of promotion and gender research has been extensively studied (see e.g., Courtney and Whipple, 1983), but measures of sexual self-concept have not commonly been considered in relation to advertising effects (Gentry and Haley, 1984; Coughlin and O'Connor, 1985). Additionally, most promotional studies have focused on women's roles in advertising, and people's reactions to these roles based on their feminist or traditionalist orientation (see e.g., McIntyre, Hosch, Harris, and Norvell, 1986).

The question has been raised of whether male vs. female spokespersons would be evaluated differently (Martin and Roberts, 1983), particularly in reference to gendered or neutral product images. It has not been answered, however, and deserves attention, since in certain product markets, both males and females have appeared in their newer post-1970s roles. Males appear as supermarket consumers in retail ads, for example, and women as bankers in financial services ads. Yet little is known about consumer reactions to spokespersons of one sex or the other. The interaction between sexual identity of the message recipient and sex role of the spokesperson seems worth studying in a dual-sex context for strategic advertising implications.

CONCLUSION

Thus, in the mid 1980s there are more questions than answers, and more new directions than replicated pathways for sex-role research to take. The search for sex traits as special kinds of personality traits useful in consumer-related predictive ways continues and should not end prematurely. The implications of social and economic change need further exploration in terms of gender effects on a firm's marketing controllables. The period of growth in gender research coincided with a dynamic era of rapid change, and the lack of definitive results in the short historical past may reflect the difficulty of studying change just as it is taking place. The present may be a more stable time to take stock of the past and consider new directions for the future, since the field of gender research appears to have important social, economic, and cultural implications which must inevitably affect marketing.

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