*The "Dual Society" Thesis in Latin America: A Reexamination of the Costa Rican Case**

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ABSTRACT

Latin American nations have often been characterized as dual societies, that is, ones in which economic and value differences separate middle class from lower class and urban dweller from rural dweller. Whereas the economic differences have been well documented, value differences generally have been assumed. The findings of one empirical study of value differences in Latin America, a study conducted some years ago in Costa Rica, support the "dual society" thesis. This article reexamines that study and discovers that value homogeneity is a more accurate description of Costa Rican society. Improved, more appropriate data analysis techniques are responsible for the new finding. The implication is that if similar techniques were applied to other studies of Latin America, the dual society thesis might be invalidated.

Social scientists have long believed that socio-economic status (SES) has a great impact on the values of individuals. Among Latin American scholars, for instance, this belief has played an important role in explaining underdevelopment. Thus, the wide income gaps between urban middle and lower classes, and the sharp contrast in wealth between the commercial metropolis and the agrarian village are thought to divide Latin Americans into two value systems: the modern and the traditional. SES, therefore, is believed to separate the urban areas into two value systems in which the middle class is alleged to possess progressive, modern values, and the lower-class traditional ones (Johnson, 1958).[1] Similarly, the urban sector is viewed as the modern, industrial, capitalistic part of Latin American society, whereas the rural sector is considered traditionalistic, and semi-feudal—in short, backward (Davidson, 1947; Lambert, 1967). In effect, Latin Americe is seen as a dual society.

The dual society thesis, however, is by no means accepted by all investigators. One dissenter, the Mexican sociologist Rodolfo Stavenhagen (1968), has labeled it totally fallacious. According to such dissenters the problem with

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[1] Johnson, in a more recent essay (1961), points out that the middle sectors have made serious political mistakes, that their leadership is on the wane, and is being usurped by groups of the political left. He does not, however, refute his original notion that "middle-sector values" are distinct from the values of other, more traditional sectors.

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the thesis is that the linkages between SES and values have not been empirically established, but have only been assumed. This point of view maintains that there is a fundamental conformity of values which cross-cuts all sectors of Latin American society (Véliz, 1967), making it impossible to distinguish a truly modern sector.

The debate between the dual society school and the conformity school has more than academic significance, since the position one takes shapes one's prescribed cure for Latin America's underdevelopment. Thus, those who argue in favor of the duality thesis urge the introduction of modern values into the rural sectors of society (through education, Peace Corps Volunteers, etc.) and the expansion of the middle class, whereas those who support the conformity view seek an end to the internal colonialism of the rural areas by the urban sector (Cotler, 1967–68; González Casanova, 1970:71–103) and an end to foreign colonialism of the nation as a whole by the anti-nation (i.e., the imperialistic powers) (González Casanova, 1970: 158–177).

A definitive resolution of the debate is, of course, beyond the scope of this article. What will be argued here, however, is that faulty and incomplete data analysis techniques used on survey research data gathered in Latin American cities and villages have led empirically oriented social scientists to support the dual society thesis regardless of what the data actually demonstrate. This investigator will attempt to prove his point by reexamining a set of data gathered in Costa Rica, originally interpreted to support the duality thesis, but which are more supportive of the conformity view.

THE SEARCH FOR A DUAL SOCIETY: CLASS DIFFERENCES IN URBAN COSTA RICA

The data to be reanalyzed here were collected by Robert C. Williamson (1962) in Costa Rica in 1960. Williamson investigated values in lower- and middle-class neighborhoods of Costa Rica's capital city and found that there were many statistically significant differences between the two classes which related to the traditional–modern continuum.[2] On the basis of those findings Williamson concluded that, ". . . the middle class . . . more than the lower, is equipped symbolically to react to social change, is more aggressively upward mobile, is possibly better adjusted to reality, and is more positive in outlook to the present and future" (1962:207). In light of Williamson's data, is this is a valid inference?

Williamson's conclusions are based completely upon statistically significant (*chi*-square) differences between the two classes. While statistical significance tells the researcher that the differences obtained in the survey are larger than those which would be expected if there were no difference in the population, it does not make any statement about the *strength* of relationship between the variables. Thus, while statistically significant relationships appear, especially as the sample size becomes fairly large, the relationship may prove to be so weak as to make it largely devoid of *theoretical* significance. This is especially true when one is attempting to verify a hypothesis such as the dual society thesis which suggests a polarization of values on the traditional–modern continuum. One would expect a statistically significant difference to be accompanied by a high degree of association. Unfortunately, Williamson's analysis ignores strength of relationship statistics and, as a result, his findings run the risk of theoretical insignificance. He reports that *36* out of *46* relationships are statistically significant, leaving the reader with the impression that lower and middle classes in Costa Rica are strikingly different from each other. An examination of strength of relationship, however, reveals a different picture. Thus, a replication of the Williamson study (1962:198–205), this time examining the strength of relationship, reveals that the majority of the *36* statistically significant relationships demonstrate *tau-b* correlations of *.19* or lower, and that only *3* of the *36* are higher than *.32*.[3] In other words,

[2] In a recent study of social class values in Chile, Williamson (1972), using similar data analysis techniques, comes to similar conclusions. Regarding the 1962 study, data were reported for El Salvador as well as Costa Rica. This writer, however, reanalyzes only the Costa Rican data set. Unfortunately, the sample did not include upper-class neighborhoods, and for this reason it will not be possible to make any statements regarding upper-class values in this paper.

[3] These *3* are perceived class affiliation, educa-

that fact that the significant relationships reported in the Williamson article were not accompanied by measures of strength of relationship, resulted in creating a misleading picture of value duality in Costa Rica. Separation of a society into two sectors, centuries apart in terms of their values, cannot be demonstrated by such low associations. The failure to report the strength of relationship is not the only weakness in the Williamson study leading to an invalid interpretation of the data. Two others were encountered.

First of all, the method used in categorizing respondents into classes is faulty. Williamson started out his analysis by dividing the respondents into two classes[4] and then proceeded to cross-tabulate these classes with their attitudes, the classes having been established on the basis of occupation, education, residence and style of living. The classification, however, is rather arbitrary since he does not make clear the precise standards he employed in the process. We do not know, for example, exactly what level of occupation, education, residence and style of living the respondent had to achieve in order to be classified as middle class. Furthermore, we do not know how Williamson classified ambiguous cases (e.g., the individual with little formal education holding a white-collar job).

The second weakness in the analysis involves the question of level of measurement. By sticking exclusively to a bivariate analysis of dichotomous and trichotomous variables, Williamson was forced to treat his data as if they were all at the nominal level of measurement. In fact, much of the data he collected are of a higher level of measurement (ordinal as well as interval); thus, he needlessly "threw away" much valuable information.

Taken together, these problems in operationalization and analysis undermine the validity of Williamson's conclusions. Nonetheless, the availability to other scholars of his original data set in its untapped fullness provides the unusual opportunity for reanalysis.[5] In this reexamination, a much more adequate test of the dual society thesis can be made.

In the reanalysis, Williamson's coding categories of lower and middle class are ignored, and in their place are substituted six indicators of SES. These indicators (urban or rural social background, quality of housing, home sanitation facilities, number of children, monthly family income, and weekly frequency of eating meat) not only offer a much more refined and objective measure of SES than the simple two-class dichotomy, but also enable the researcher to place the respondents along a continuum of lower-to-middle class without having to create an artificial cutting-point between the classes. Furthermore, in order to avoid the error of wasting data, as the original study did, the reanalysis takes full advantage of the data set by using higher level measures of association whenever appropriate.

The reanalysis of the data focuses upon two different correlation matrices. The first matrix (Table 1) involves the association of SES variables and those attitudes which are measured by ordinal scales.[6] Examination of the table reveals very weak strengths of relationship between SES and attitudes; of the *42* of Kendall's

tion of husband, and ownership of a library of fifty volumes or more (*tau-b* correlations range from *.46* to *.59*). Of these, however, only the first can be strictly construed as demonstrating value differences between the classes since the other *2* are closely tied to economic class differences.

[4] Actually, Williamson first divided the respondents into *5* classes (lower-lower, lower, upper-lower, lower-middle, and middle), but in the article he collapses these *5* into *2* (lower and middle).

[5] The cards and codebook were supplied by the International Data Library and Reference Service of the University of California at Berkeley. The data analysis was performed using the University of Michigan's OSIRIS II programs, as implemented on the University of Pittsburgh's IBM 360 system.

[6] All of the questions reported in the original article are not dealt with here; rather, what is examined is one or two principal questions from each dimension Williamson considered. This limitation was made necessary by space considerations and by the fact that several questions did not relate closely to the topic of this paper. It should be noted that Williamson's article reports an *N* of *245* (*109* middle-class and *136* lower-class) while the archival data set provides only *222* respondents for the urban sample. Perhaps the original article contains a misprint or some of the cases were inadvertently deleted in the preparation of the archival data set. The reader is referred to Williamson's (1962) article for details of the questions, survey methods, and sample.

Table 1. SES and Attitudes in Urban Costa Rica: Nominal and Ordinal Data

	Confides with Mate	Visits of Children with Godparents	Church Attendance: Husband	Church Attendance: Wife	Frequency of Confession	Participation in Voluntary Associations	Occupational Satisfaction of Husband	N* Total Sample = 222
Social background of respondent (urban or rural)	−.01†	−.14	−.13	.14	.09	.05	.11	99–214
Quality of housing	.09	−.09	.02	−.16	.09	.04	.23 (.005)	99–214
Home sanitation facilities	.15	−.02	−.04	−.16 (.02)	.03	.27 (.005)	.34 (.001)	102–216
Number of children	.01	.01	−.02	.00	−.05	.03	−.00	102–214
Monthly family income	.21	−.13	.02	−.15	.14	.36 (.05)	.23	99–204
Weekly frequency of eating meat	.14 (.001)‡	−.19 (.01)	−.02	−.16 (.05)	.06	.32	.21 (.02)	102–215

* Varies due to nonresponse.
† Correlations are all *tau-b*s.
‡ Numbers in parentheses are *chi*-square levels of statistical significance at the .05 level or better.

*tau-b*s reported, only *8* are higher than *.20*, with the highest correlation of all reading *.36*. The correlations reported in Table 1, however, will not tell the researcher anything about the broader population from which the random sample was drawn (i.e., San José, Costa Rica) unless he applies a test of statistical significance. Applying the *chi*-square test of significance we find that only *9* of the *42* correlations are statistically significant at the *.05* level or better. Furthermore, the statistically significant correlations are dispersed in an almost completely random fashion. No consistent pattern of values appears. Finally, *3* of the significant correlations are not in the predicted direction. We may conclude from all this that, as the SES measures become more objective and less arbitrary, support for the dual society hypothesis diminishes.

The second matrix (Table 2) involves the 6 SES variables and those dependent variables measured on an interval scale or which are "dummy" variables.[7] Here we find that a pattern emerges which is substantially similar to that in Table 1. Nearly all the Pearson *r*s[8] are quite low and, with the exception of a few cases which will be discussed shortly, explained variance stays well below the *10* percent level.

Up to this point in the analysis, contrary to expectation, the relationship between values and SES variables has been generally weak. It would appear, then, that SES differences do not result in strong value differences among urban Costa Ricans. Yet, before this conclusion can be firmly asserted, a final step in the analysis needs to be taken. The independent examination of each SES indicator alone may have deflated the correlations since class is not merely income, social background, housing style, etc., each one considered by itself. Rather, class is a combination of all these indicators (and others not measured in this study) taken together. This would imply that all of the SES indicators reported here, acting together, might produce a stronger predictor

[7] A number of the variables reported in Table 2 (e.g., the yes-no variables) as well as some of the indicators of SES are not considered by some as interval level measures. Yet, it has become common practice lately to assume an interval level of measurement for such "dummy" variables in order to be able to apply the more powerful product-moment statistic. One recent example of this, focusing on class, is Hodge and Treiman (1968: 536–537). All variables reported here were analyzed both with an ordinal measure (*tau-b*) and an interval measure (Pearson *r*); the differences in the strength of relationship, however, were only minor.

[8] The Pearson *r* model assumes that the population relationship is linear. Scatterplots for these data demonstrate that there is no significant departure from linearity.

Table 2. SES and Attitudes In Urban Costa Rica: Interval Data

	Husband's Approval of Birth Control	Wife's Approval of Birth Control	Marriage of Interviewee: Civil or Consensual Union	Residential Mobility	Travel Outside the City	Number of Intimate Friends	Approval of Classes in Central America	N* Total Sample = 222
Social background of respondent (urban or rural)	.07†	−.01	.32 (.001)	−.05	.04	.06	.03	163–210
Quality of housing	.01	−.06	.34 (.001)	−.06	.14 (.05)	−.13	.06	162–210
Home sanitation facilities	.16 (.05)‡	.20 (.01)	.28 (.001)	.09	.29 (.001)	−.00	−.07	160–209
Number of children	.09	.19 (.01)	.03	.07	.08	−.07	−.01	163–214
Monthly family income	.24 (.01)	.18 (.05)	.26 (.001)	−.14 (.05)	.35 (.001)	−.18 (.05)	−.10	158–190
Weekly frequency of eating meat	.22 (.01)	.14	.45 (.001)	−.12	.36 (.001)	−.08	−.06	163–203

* Varies due to nonresponse.
† Correlations are all Pearson *rs*.
‡ Numbers in parentheses are *t*-test levels of statistical significance at the .05 level or better.

of attitudes than any one indicator acting alone. While Williamson, too, recognizes the importance of multiple indicators, his approach incorporates them arbitrarily and unsystematically. Multiple correlation coefficients can be used to test this hypothesis by examining the combined effect of all *6* SES indicators on each attitudinal variable.[9] The results, which are presented in Table 3, substantiate this hypothesis. In every case the combined SES indicators produce a higher correlation (and thereby explain more of the variance) than any single SES indicator acting alone. Yet, with all *6* indicators of class working together, so to speak, to predict attitudes, we still find low multiple correlations in most instances. Of the *7* independent variables considered, *5* yield statistically significant correlations. Only *3* of these, however, explain more than *10* percent of the variance, using the combined effects of social background, quality of housing, home sanitation facilities, family income, number of children, and frequency of eating meat. Thus, even though SES indicators are combined, all of them together end up accounting for only a small portion of the total variance. Given the presumed separateness of the two value systems, it is questionable whether this is enough to validate the dual society thesis.

The two moderately high correlation coefficients should be examined in more detail. The combined SES indicators explain *19* percent of the variance of travel outside the city, referring to the frequency of trips of over thirty miles from home, and *29* percent of the variance in civil versus consensual union marriages. The interpretation of these correlations, however, does not necessarily support the dual society thesis since it is not clear if a greater extent of travel and civil marriages really represent modern attitudes or if they merely reflect the respondents' economic position, since both of these variables involve financial expenditures beyond the means of many low-income individuals.

[9] Multiple correlation coefficients should not be computed when the independent variables are highly correlated with each other (multicollinearity) since the independent contribution of each variable is meaningless. In order to guard against committing this error, the six indicators of SES were correlated with each other. It was found that at best the correlations reach .5, thereby encouraging the use of the multiple correlation coefficients. This lack of strong correlation between the indicators demonstrates that each one was measuring a somewhat different aspect of SES, thereby further discouraging the gross division of classes as presented in the Williamson study.

Table 3. Combined SES Indices and Attitudes: Multiple Correlation Coefficients*

	Husband's Approval of Birth Control	Wife's Approval of Birth Control	Marriage of Interviewee: Civil or Consensual Union	Residential Mobility	Travel Outside the City	Number of Intimate Friends	Approval of Classes in Central America
Combined SES indices (multiple correlation coefficients)	.30	.33	.54	.18	.44	.25	.12
Percent of explained variance	9	11	29	3	19	6	1
Level of statistical significance (*F* ratio)	.01	.01	.001	ns	.001	.05	ns

* N = *222* (varies due to nonresponse).

THE SEARCH FOR A DUAL SOCIETY: RURAL–URBAN DIFFERENCES IN COSTA RICA

In an effort to investigate value differences between rural and urban Costa Rica, Williamson (1963) administered his questionnaire to a small sample of respondents ($n = 42$) in a rural village, San Ignacio de Acosta. This sample was compared with the urban sample discussed previously.[10] Williamson found a number of statistically significant differences in values between the two samples. How do these findings stand up under the lines of analysis followed in the preceding pages?

The answer to this question is provided by Tables 4 and 5. First the respondents are divided by residence (i.e., either urban or rural)[11] and then the attitudes in the two samples are compared. Of the *20* variables listed in the two tables, only *8* demonstrate statistical significance at *.05* or better, and the strength of relationship reaches no higher than *.23* (frequency of confession).

It may be hypothesized that the reason for such small differences in attitudes between the rural and urban residents is that the lower SES urban residents tend to pull down the "modernity" scores of the urban residents as a whole, while the higher income rural residents tend to elevate the overall rural scores. In order to test this hypothesis, a number of SES factors were controlled for in Tables 4 and 5. The results fail to substantiate this hypothesis; neither the number of statistically significant correlations nor the strength of relationship is appreciably increased with the introduction of SES controls. The strongest statistically significant relationship in this series of correlations is *.25*.

One final hypothesis should be tested. Migration from village to city has become such a prevalent phenomenon in Latin America today (Beyer, 1967) that one might expect a fair number of urban residents to turn out to be recent migrants from the countryside and therefore to possess rural values. The original questionnaire did not inquire as to the number of years that the respondent had been living in the city, but it did ask "During the first ten to fifteen years of your life, where did you live?" With this information it is possible to separate out those respondents whose youth was spent in the rural areas from those who now live in the city. An examination of nonmigrants, however, does not reveal any markedly stronger differences between their attitudes and those of the sample as a whole.

CONCLUSIONS

The overall conclusion we can draw from this reanalysis is that the hypothesized duality of attitudes based on class and rural/urban differences does not exist in the sample analyzed, Williamson's conclusion to the contrary notwithstanding. Attitudes on such things as birth

[10] The urban sample size reported by Williamson (1963) is *217*, and not the 245 reported in the previous article (1962). As before, the sample provided by the punch card data set was *222*.

[11] Since all of the rural residents came from a single village and all of the urban residents were drawn from San José, there is no ambiguity in classifying the respondents as urban or rural. Therefore, the problems faced above in dividing respondents on the basis of class are not present in this section.

Table 4. Residence and Attitudes in Costa Rica: Nominal and Ordinal Data

	Confides with Mate	Visits of Children with Godparents	Medical Practices (Folk or Modern)	Church Attendance: Husband	Church Attendance: Wife	Church Attendance: Child	Frequency of Confession	Participation in Voluntary Associations	Occupational Satisfaction of Husband	N* Total Urban = 222 Total Rural = 42
Residence (Urban or Rural)	−.06‡	.02	−.03	.20 (.05)§	.09	.13 (.05)	.23 (.05)	.11	−.01	150–254
Controlled for:										
1) middle income (≥$70 monthly)	−.02	−.08	−.09	.06	.05	.14	.21	.08	.13	82–125
2) low income (≤$70 monthly)	−.18	.14	−.00	.26	.17	.12	.25	−.02	−.21	55–109
3) 0–4 children	−.04	.04	−.05	.18	.09	.12	.22	.13	.03	96–169
4) 5–11 children	−.04	.00	.09	.15	.03	−.03	.20	.10	−.20	48–91
5) good housing†	−.03	−.00	−.03	.19	.05	.12	.20	.11	.03	132–232
6) nonmigrant	−.06	−.04	.00	.18	.01	−.02	.19	.07	−.06	173–216

* Varies due to nonresponse.
† Poor housing was not controlled for because total *N* was very small (around *20*). Fisher's exact test was applied, but no statistically significant correlations appeared.
‡ Correlations are all *tau-b*s.
§ Numbers in parentheses are *chi*-square levels of statistical significance at the *.05* level or better.

Table 5. Residence and Attitudes in Costa Rica: Interval Data

	Husband's Approval of Birth Control	Wife's Approval of Birth Control	Marriage of Interviewee: Civil or Consensual	Residential Mobility	Travel Outside of Locality	Approval of Chaperonage	Number of Intimate Friends	Voted in Last Election	Approval of Classes in Central America	Contentment with Life Situation	"Protestant Work Ethic"	N* Total Urban = 222 Total Rural = 42
Residence (Urban or Rural)	.21‡ (.01)§	.21 (.01)	−.03	.14 (.05)	.17 (.01)	.02	.04	−.07	.13 (.05)	.04	.04	197–259
Controlled for:												
1) middle income (≥$70 monthly)	−.03	.04	−.06	.03	.12	−.02	−.10	.03	.03	.11	−.03	101–131
2) low income (≤$70 monthly)	.23 (.05)	.18	−.11	.25 (.02)	.11	.06	.12	−.11	.21 (.05)	−.11	.04	83–107
3) 0–4 children	.14	.14	−.12	.15	.18	−.01	−.04	−.05	.07	.11	.02	135–170
4) 5–11 children	.25 (.05)	.25 (.05)	.05	.15	.15	.08	.20	−.07	.24	−.07	.05	71–91
5) good housing†	.21 (.01)	.20 (.01)	.03	.18 (.05)	.20 (.01)	.03	−.02	−.05	.12	.07	.03	175–230
6) nonmigrant	.27 (.005)	.26 (.005)	.07	.18	.05	.09	.04	−.11	.13	.01	.04	176–216

* Varies due to nonresponse.
† Poor housing was not controlled for because total *N* was very small (around *20*). Fisher's exact test was applied, but no statistically significant correlations appeared.
‡ Correlations are all Pearson *r*s.
§ Numbers in parentheses are *t*-test levels of statistical significance at the *.05* level or better.

control, medical practices, chaperonage, godparentage, church attendance, etc., are all highly similar in the lower and middle classes and among urban and rural groups.

More sensitive methodology, therefore, has contradicted the findings of the original researcher, and, on a broader plane, suggests that other data on attitudinal differences in Latin America must be reexamined with more powerful research tools. At the very least, this study should encourage researchers to report the strength of relationship as well as levels of significance when presenting their findings. We have too long been lulled into accepting statistical significance as theoretical significance. Dual societies may exist in other Latin American countries, but tests of statistical significance should not be used as the sole basis for drawing such a conclusion. The existence of dual societies requires more empirical confirmation than small differences in values.

Some might argue that the absence of a dual society in a nation as small as Costa Rica is not very surprising at all, and that the chances of not finding a dual society in Latin American countries as large as Mexico and Brazil, for example, are probably very slim. However, as Joseph Kahl (1965) has discovered, as far as the urban versus rural value system is concerned, there are few statistically significant differences between rural Mexico and Mexico City, or between rural Brazil and Rio de Janeiro.

Perhaps equally as valuable as the Kahl evidence in lending support to the present findings on Costa Rica, is the insight of a Costa Rican sociologist. The conclusion of Eugenio Rodríguez Vega (1953), based on close, personal observation of his countrymen, merits quoting here:

> Perhaps it could be affirmed, without exaggerating, that every one in Costa Rica is middle class: if not by virtue of the economic means they have at their disposal, then at least by the mentality with which they are endowed; the middle-class psychology is, really, the common denominator of the Costa Rican psychology. . . . As of today, we have not been able to determine a clear delimitation of classes in Costa Rica, precisely because the only difference that there is between the various sectors is economic, the other factors being unimportant (translation mine).

Although they do not mean to underestimate the severity of the economic differences separating the rich from the poor in Costa Rica, the findings of this study heartily support Rodríguez' conclusion.

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