

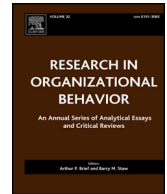


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## Where did “Tex-Mex” come from? The divisive emergence of a social category<sup>☆</sup>

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### ABSTRACT

Research on social categories has become one of the more active lines of research on organizations. Much of this research presumes the pre-existence of at least the “seed” of the category and then proceeds to study and explain how the category developed and became institutionalized. By contrast, this study joins several recent others in attempting to identify and explain why a previously non-existent social category emerged in the first place. Empirically, we examine the emergence of the Tex-Mex social category for food and cuisine. In studying Tex-Mex food, we present a brief analytical social history of the cuisine starting in Old Mexico and continuing up to contemporary times. We juxtapose the social facts that we report with prevailing theoretical ideas (social-activist theorization and similarity clustering) about category emergence drawn from organization theory. While insightful, we find current theoretical accounts to be incomplete in explaining why Tex-Mex emerged. By contrast, our analysis directs attention to the status dynamics of ethnic majority/minority populations, early inexpensive mass industrialization of the food and certain geographic factors. Casual comparisons to other ethnic food categories appear to support the speculative argument we advance.

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### Contents

Introduction .....	00
Theory and research on category emergence .....	00
Capsule social history of Tex-Mex food .....	00
Mexican food and the Tex-Mex label .....	00
Food in Mexico before and after the Spanish conquest .....	00
Mexican America .....	00
Regional variations in Mexican-American food .....	00
Tex-Mex emerges as a social category .....	00
Disparagement of Tex-Mex food .....	00
Tex-Mex is a blended, Americanized cuisine .....	00
Tex-Mex is a rustic and simplified style that originated north of the Mexican border .....	00

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Tex-Mex is cheap mass-industrialized food aimed largely aimed at non-Mexicans ..... 00  
 Authenticity of Tex-Mex food ..... 00  
 Theoretical reconciliation ..... 00  
 Activist theorization ..... 00  
 Similarity clustering ..... 00  
 Racism, cultural prejudice, and the dynamics of ethnicity and status ..... 00  
 Summing up ..... 00  
 Discussion ..... 00  
 References ..... 00

**Introduction**

One of the more vibrant strands of contemporary organizational research examines how social categories influence and shape organizational behavior and performance. Category research investigates the emergence of categories (Croidieu, Rüling, & Boutinot, 2016), the constraints imposed by categories (Hsu, 2006), and the social and economic sanctions associated with category association (Zuckerman, 1999). Overall, this research has sensitized analysts to the many important ways that social categories affect organizations (for reviews see Durand, Granqvist, & Tyllström 2017; Negro, Kocak, & Hsu, 2010).

The vast bulk of theory and research on categories presumes the existence of a category or a set of categories and proceeds from that vantage point (Jones, Maoret, & Massa, 2012). For instance, category spanning of organizations across multiple categories is of major interest. Hsu (2006) lays the problem out nicely, which she describes as attempting to be a “jack of all trades and master of none.” She shows that category-spanning firms suffer a market penalty. Likewise, Negro, Hannan and Rao (2010) show that wines spanning broad institutionalized categories of “traditional” versus “modern” receive less critical acclaim that those clearly classified in either individual category. Paollela and Sharkey (2017) find that category spanning affects the clarity of organizational identity. Kovács and Hannan (2010, 2015) bring category distance (or what they call “contrast”) into the picture.<sup>1</sup> More broadly, the ecology of categories concerns the development and positioning of categories relative to each other (Pontikes & Hannan, 2014). In summarizing this line of research, Jones et al. (2012: 1523) say, “most category studies have focused on established categories with discrete boundaries.”

A question central to this research program on social categories concerns how and when does a new category emerge initially and evolve over time? An earlier stream of organizational research posed a very similar parallel question with respect to an organizational form as the emergent entity (Ruef, 2000). Analysts differ in the degree to which they consider the distinction between category and organizational form important and in the ways they distinguish between the two. For many analysts, category is the broader, more abstract concept and represents an institutionalized classification of a set of particular activities and actors, while organizational form is a more concrete set of features expected for an organization associated with a particular label. When considered together, an organizational form can be considered the commonly accepted organizational manifestation of a category; it is the socially accepted blueprint for organizations operating in a category using a particular label (Hannan, Polos, & Carroll, 2007). So, for instance, if a category for restaurants is “Italian cuisine,” then the organizational form is the set of taken-for-granted features that one expects to encounter upon examining an organization called an “Italian restaurant.” Fit to the expected blueprint need not be black or white—it can be a matter of degree and it can vary by audiences and it can vary over time.

Despite this conceptual distinction, extant research on category emergence often bases its explanations on phenomena and factors very similar to those deployed previously to explain organizational form emergence. Theories commonly used to explain category or form emergence typically identify as key variables structural aspects of the contextual organizational social structure such as density (Ruef, 2000),

crowding, straddling, contrast (Boegart, Boone, & Carroll, 2010) and differentiation (McKendrick, Jaffee, Carroll, & Khessina, 2003, Navis & Glynn, 2010). Other theories look beyond the dynamics of producer organizations in the immediate domain and see external agents and organizations as key. Sometimes these agents are individuals or sets of individuals behaving as activists leading a social movement of sorts (Rao, Monin, & Durand, 2003). In other accounts, these agents include collective groups and entities such as consumers (Rosa, Porac, Runsor-Spanjol, & Saxon 1999; Sørensen & Feng, 2017), industry associations (Wagespuck & Sorenson, 2010), market intermediaries such as promoters (Khaire, 2017), institutional logics (Jha & Beckman, 2017) and agents of the state (Ahmadjian & Edman, 2017).

Analysts seem to agree that a fundamental part of the early category emergence process involves the articulation of, agreement about, and adoption of a label (or name) for the category. They also agree about the early-stage presence of a handful or more of highly engaged individuals, often referred to as activists, enthusiasts or vanguards. Beyond that, we see a major difference residing in the roles, activities and prominence that these early engaged individuals are theoretically depicted as playing. For conceptual convenience, we cast these depictions into two basic kinds of theoretical accounts, recognizing the possible loss of subtlety in doing so.

In the first kind of account, exemplified by Rao et al. (2003), the activists are portrayed as social movement entrepreneurs. These “entrepreneurs” are essentially advocates for the category. They are seen as being heavily involved in “theorization” of the nascent category and its rationale. They are also seen as undertaking and supporting organizational activities that communicate the category’s label and its “theory.” In addition, these social movement activists are viewed as attempting to persuade potential adherents to support and join in activities associated with the category. Rao et al. (2003) claim that the nouvelle cuisine category in France emerged this way.

In the second kind of account, developed most explicitly by Hannan et al. (2007), the enthusiasts play a prominent role in a process called “similarity clustering.” This process involves the cognitive grouping of entities perceived to be similar based on comparisons of their features with other available entities. In Hannan et al.’s (2007) depiction, the comparisons are systematic and bilateral, meaning that every entity is seen as being compared directly to every other entity in a one-to-one way. By this process, the category’s emergence accelerates fully only after early enthusiasts have come to some agreement about a similarity cluster and associated a label or name with it.

Notice that while the two accounts do not necessarily disagree with each other, they do emphasize very different roles and activities of activists. Most importantly, in the social-movement account, political and social interests seem to be driving the activists (although the advocacy arguments advanced often espouse a purely public interest). By contrast, in the similarity-clustering account, sense-making through cognition seems to be a strong driver. Here the enthusiasts mainly want to impose conceptual order on the world and interests do not seem to come into play, at least explicitly.

Common labeling of a set of entities encourages individuals to emphasize their underlying similarities, and facilitates communication about the set as a whole. Common labeling also guides the perception of others into thinking about the labeled set as a unified grouping. Such perception paves the way to schematization, automatic cognition and institutionalization as a default code embedded with expectations. Galperin and Sorenson (2014) show in an experiment that labels convey more salience to individuals than do descriptive attributes of category members and their common characteristics; they found consumers preferred products with the “organic” label more than those which listed the attributes required to be organic. In research on categories, labels

<sup>1</sup> Some of this work flows naturally from an earlier and continuing research tradition examining resource partitioning. See McKendrick and Hannan (2013).

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