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TASK-GROUPS AS SELF-CATEGORIES: A SOCIAL IDENTITY PERSPECTIVE ON STATUS GENERALIZATION

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ABSTRACT

In this paper we incorporate the concept of self-categorization into status characteristics theory to offer a group-based approach to status generalization. We suggest that task-groups can be understood as self-categories, and that the cognitive and motivational processes associated with psychological group formation have implications for status characteristics theory. In Study 1 self-categorization with an other in terms of a shared group membership increased collective orientation. In Study 2 intergroup categorization, combined with high identification with the ingroup, undermined collective orientation and increased stay responses towards an outgroup partner. Implications for further exploring the intersection of status-organizing and social identity processes are discussed.

INTRODUCTION

Differentiation within small groups, in terms of inequalities in the relative power, prestige, and influence of group members, have been studied extensively since the early observations of Bales (1950) and Sherif (Sherif, Harvey, White, Hood, and Sherif 1961). One approach that addresses this issue directly and specifically is status characteristics theory (Berger, Fisek, Norman, and Zelditch 1977) and its extensions (Ridgeway 1991; Ridgeway and Berger 1986; Shelly 2001). These theories focus on a process called status generalization, through which external status characteristics like gender, race, and age, affect rates of participation and influential in small informal task-groups. Applied to small groups, status generalization is conceptualised as an interpersonal process operating between dyads. However, an increasingly influential perspective on group processes, the social identity approach (Turner 1982; Turner 1985; Turner, Hogg, Oakes, Reicher, and Wetherell 1987), offers an alternative perspective on the group and its internal structure that we argue may be informative for status characteristics theory, and useful for further understanding the status generalization process.

Status Characteristics Theory

Status characteristics theory (Berger, Cohen, and Zelditch 1972; Berger, Fisek, Norman, and Zelditch 1977; Berger, Rosenholtz, and Zelditch 1980; Berger, Wagner, and Zelditch 1985) is concerned with explaining and predicting patterns of behavioural inequalities that emerge within newly formed task-groups. In particular, the theory focuses on the effects of task-group members' external social status on their rates of participation and influence within the group. Early studies revealed that group members with high social status outside the task-group had more influence over group decisions than members with lower external social status. For example, Moore (1968) found that junior college students were more influenced by a partner they believed came from a private university than by a partner they believed was from a high school, and Berger and colleagues (1972) found that higher ranked military personnel were more influential than lower ranked privates when interacting to solve a novel and non-military task. This effect seemed to hold regardless of whether the status characteristic differentiating group members was relevant or irrelevant to the task (for reviews see Berger, Cohen, and Zelditch 1972; Webster and Foschi 1988).

To explain these effects, Berger and colleagues (1972; 1977) argued that status characteristics, like education level and formal rank, generate expectations of competence, which give higher status actors an influence advantage in task-oriented interactions. Furthermore, it was argued that many status characteristics generate general expectations of competence that become relevant to a wide range of tasks, giving those with more valued characteristics an influence advantage over those with lesser valued characteristics, even when the characteristics are not associated with the task. Hence, whenever a status characteristic differentiates group members or is associated with the group's task, it will be used to derive expectations of group members' relative task ability unless it is explicitly dissociated from the task. Through this process, status structures in society are maintained in small informal task-groups.

Status generalization is hypothesized to operate only under a specific set of conditions, called scope conditions. Scope conditions may be conceptualized as independent variables held constant in order to limit the generalizability of the theory to a specific and well-defined domain, and to maximize comparability across studies (Foschi 1997). The main scope conditions of status characteristics theory are that actors must be goal oriented and collectively oriented. Goal orientation means that the actors value the task and want to achieve the correct or best outcome. Collective orientation means that the actors consider it important and necessary to take into account the views of the other(s) in order to achieve a successful outcome (Berger, Fisek, Norman, and Zelditch 1977; Berger, Rosenholtz, and Zelditch 1980; Meeker 1981).

In this paper, we argue that the scope conditions of status characteristics theory are outcomes of psychological group formation, which is a function of the dual processes of self-categorization and social identification. We argue that collective orientation arises from psychological group formation, and the development of status relations within a task group is facilitated by the perception of a shared social identity.

The Social Identity Approach

The social identity approach (Haslam 2001; Tajfel and Turner 1986) has made a significant impact on many areas of social psychology by providing a theoretical account of group behaviour that is located within the individual and yet not based on individual or inter-individual psychological processes. At the heart of this approach is the idea that group behaviour reflects a shift in self-conception away from individuating characteristics to self-definition as a group member. When individuals define themselves in terms of a shared group membership, part of their self-concept is shared with other group members, enabling them to think and act as a unit. The coordination that arises from psychological group formation is due in part to a shared understanding of the group's goals, values, and procedures (Turner 1984; Turner et al. 1987), and in part by enhanced motivation to achieve group goals (van Knippenberg 2000), increased cooperation and liking (Hogg 1992), and reduced individual self-interest (Turner and Bourhis 1996). In this way, psychological group formation facilitates group coordination and behaviour.

According to the social identity approach, psychological group formation comes about through two related processes: self-categorization and social identification. Self-categorization is a cognitive process through which a collection of individuals, including the self, become perceived as a single unit. This occurs primarily through contrasts at the group level (Oakes 1987). For example, a comparison between countries bidding for the Olympic Games makes self-categorization (and self-definition) in terms of one's nationality more likely than self-categorization in terms of, say, gender. Self-categorization in terms of a specific group membership is also more likely when that group is highly accessible in memory (Haslam, Oakes, Reynolds, and Turner 1999). Importantly, the social identity approach suggests that in any given social context, one level of self-categorization is most salient, and it is in terms of this level that self and others are evaluated.

A somewhat separate issue to self-categorization is the individual's level of identification with a group (Jetten, Spears, and Manstead 1997). Although one may perceive themselves to be a member of a particular group, that group may or may not be an important part of the individual's self-concept. When it is important, individuals tend to internalise the norms and values of the group and perceive themselves as fairly typical of the group. They are also motivated to see the group in a positive light, and tend to be attracted to and cooperate with other group members. Hence, group behaviour like cooperation and coordination are increased to the extent that group members identify with their group.

Psychological Group Formation and Social Influence

The social identity approach has been applied to a number of issues relevant to status characteristics theory, including social influence. According to Turner (1991), social influence is a group-based process. Individuals are influenced by the groups they belong to because groups validate knowledge through social consensus. Beliefs, values, and perceptions are seen to be valid to the extent that they are held by others. However, group membership is an important moderator of this process. Differences in group membership can explain differences in opinion, so that disagreements from outgroup members do not create uncertainty to the same extent as disagreements from ingroup members. Hence, it is only with ingroup members that we expect to agree and with whom we are motivated to reach agreement.

Several studies provide support for the hypothesis that ingroup members are more influential than outgroup members (e.g. Abrams, Wetherell, Cochrane, Hogg, and Turner 1990; McGarty, Haslam, Hutchinson, and Turner 1994). For example, Abrams et al. (1990) have shown that individuals are more influenced by others from their own group than by others from a different group, even when the groups are experimentally created and the task is unrelated to group membership. These and other studies suggest that psychological group formation provides the conditions under which it is considered important and legitimate to consider the views of others, and to influence and be influenced by them. That is, psychological group formation facilitates social influence by creating collective orientation.

Integrating Social Identity and Status-Organizing Processes

Recently, several studies have been reported that directly compared the effects of group membership and status characteristics on patterns of influence (Kalkhoff and Barnum 2000; Oldmeadow, Platow, Foddy, and Anderson 2003). In these studies, the researchers presented participants with partners or targets who were higher or lower in status and either shared or did not share a group membership with the participant. Both studies found that status and group membership had additive effects on influence. That is, participants were most influenced by others who were higher status and shared a group membership with themselves.

The research by Kalkhoff and Barnum (2000) and Oldmeadow et al. (2003) has been important in identifying links between the social identity approach and status characteristics theory, and demonstrating that both status and group membership information can operate concurrently to affect patterns of influence. However, neither study manipulated the salience of group membership, nor measured the degree to which participants identified with their group(s). Therefore, we cannot ascertain whether the participants in these studies self-categorized in terms of their differentiating group memberships or in terms of the task group itself, nor how strongly they identified with each.

The level at which people self-categorize in a particular context and their strength of identification with that group are central predictors of evaluations and behaviour towards others. For example, in a particular context a person may self-categorize as a member of an organization while being aware that the organization is made up of individuals from different ethnic, gender, and age groups. Nevertheless, the person will perceive and respond to these diverse individuals as ingroup members, because they are all included in the most salient level of self-categorization in the context – the organization. Very different behaviour could be expected if the person self-categorized at the level of gender or ethnicity. The salience of a group membership and level of identification with it are theoretically central in the social identity analysis of group behaviour.

The Current Research

In the current research we examined the effects of self-categorization and social identification with other task-group members on collective orientation and influence. As outlined above, self-categorization and social identification with other task-group members should create collective orientation, facilitating social influence and the development of status relations between group members.

We tested these ideas in two experiments. In the first experiment, we measured collective orientation and acceptance of influence amongst participants who were either explicitly categorized as members of the same group, or not explicitly categorized. We hypothesised that participants would be more collectively oriented towards, and more influenced by their partner when they were explicitly categorized compared to when they were not explicitly categorized.

STUDY 1

Method

Participants and Design

Twenty-one male and 21 female undergraduate psychology students were randomly assigned to a categorized or non-categorized (control) condition. We used a median split on identification scores to create a second two-level factor. Thus the study was a 2 (categorized vs. non-categorized) by 2 (high vs. low identification) independent groups design. Age ranged from 18 to 47 with a mean of 21 years. All participants were paid for their participation.

Materials

The task we used was a binary-choice visual discrimination task, developed by M. Foddy and B. Ong (see Foddy and Smithson 1996), modelled on Berger et al.'s (1977) standard experimental paradigm. In this task, participants are shown pairs of rectangles, each made up of a proportion of smaller red and blue rectangles, and asked to choose which in each pair contains the largest proportion of red. In fact, both rectangles in each pair contain exactly the same proportion of red, but the red and blue shapes are distributed differently such that it is conceivable that one has more or less than the other. On each trial, participants make an initial choice and, after a short pause, receive feedback about which one the partner had ostensibly chosen. They are then prompted to make a final choice. The program was designed so that the participants learn that the partner had chosen differently to them on 20 of the 25 trials. The computer program stores the participant's initial and final choices, so that an influence score can be computed as the proportion of times the participant stayed with their initial choice on those trials in which they initially disagreed. This score is termed "stay responses" [denoted as $p(s)$] and is our measure of social influence.

Procedure

Participants arrived individually and were led to a private room within the laboratory. After a delay of several minutes, ostensibly to wait for the other participant to arrive, the experimenter explained the procedure. In the non-categorized condition, it was explained that the study was investigating various aspects of team work and team performance and that the participant would be asked to perform a task on a computer with another student participant sitting in another room. In the categorized condition it was added that this study was particularly investigating how well teams of university students perform the task compared to teams of TAFE students (TAFE is a form of higher education aimed at teaching trades). Participants were told that there was some new research suggesting that university courses may be teaching students important team-work skills that TAFE students were not getting, and that the performance of university students on a team task would be compared to that of teams of TAFE students to see if there is a difference.

The experimenter then explained the task. Participants were told that it was called the Contrast Sensitivity Task, and involved making decisions about contrasts in patterns and shapes. They were informed that Contrast Sensitivity is an abstract ability that is required to make judgements like those in the Contrast Sensitivity Task, but which is not related to other known abilities such as maths or artistic ability. Participants first completed a short practice task consisting of ten trials without partner feedback, in order to familiarize themselves with the task. Once this was completed, the experimenter explained the team-work phase of the task. It was explained that the participants' and their partner's computers would be linked so that they would be able to see how their partner had responded to each trial before making a final choice themselves.

The experimenter then asked the participants to complete an "information sheet" asking about their gender and year of study. In the categorized condition the participants also were asked to indicate whether they were a University student or a TAFE student. This was done to maximize the salience of participants' social (university student) identity. Participants then completed the task, ostensibly with the partner, receiving feedback about the partner's responses at each trial.

Following the task participants completed a questionnaire measuring collective orientation and their level of identification with the group "university students." Collective orientation was measured with one item, measured on a 7-point Likert-type scale, that asked "how important was it to you to take your partner's decisions into account in making your final decisions?" The identification measure was a four-item scale adapted from Doojse, Ellemers, and Spears (1995). Participants indicated their agreement or disagreement, using 7-point Likert-type scales, with the following four statements: "I see myself as a university student," "I am pleased to be a university student," "I feel strong ties with other university students," and "I identify with other university students." When finished, the participants were debriefed, paid and dismissed.

Results

There was no difference in identification as a function of the categorization manipulation, $t < 1$. A two-level identification factor was created using a median split on the identification scale (Median = 23; M for high identifiers = 24.68, SD = 1.61; M for low identifiers = 19.55, SD = 2.39). Two separate ANOVAs were conducted to examine the effects of categorization and identification on collective orientation and stay responses.

There was a significant main effect of categorization only on collective orientation, $F(1, 38) = 4.16$, $p = .048$, Partial Eta-squared = .10. Participants were more collectively orientated in the categorized condition ($M = 5.90$, $SD = 1.07$) than in the non-categorized condition ($M = 5.09$, $SD = 1.38$). There was no main effect of, nor interaction with, identification, $F_s < 1$.

Collective orientation and stay responses were significantly negatively correlated, $r = -.57$, $p < .01$. However, there were no significant main effects or interactions on stay responses (all $F_s < 1$). Participants were not more or less influenced by the partner in the categorized condition than in the control condition.

Discussion

As hypothesized, we found that participants were more collectively orientated when categorized as members of the same group compared to not being explicitly categorized. In this study, social identification did not moderate the effects of categorization on collective orientation - both high and low identifiers were more collectively oriented in the categorized condition than in the non-categorized condition.

Unexpectedly, there was no parallel effect on social influence. Participants were no more or less influenced by the partner under categorized and non-categorized conditions. This finding was somewhat surprising, given the highly significant correlation between collective orientation and stay responses. One possible explanation has to do with the manipulation of self-categorization. In the categorized condition participants were told that their group (University students) might possess better team-work skills than the outgroup (TAFE students), and that the scores from university students would be compared to those of TAFE students. In addition to affecting the salience of participants' university identity, this manipulation may also have affected the relative status of the ingroup. That is, participants may have felt that they had relatively higher ability than TAFE students in relation to the task, and thus felt more confident in their own responses compared to non-categorized participants. This may explain why categorized participants were no more influenced by the partner than non-categorized participants, despite being more collectively oriented.

Overall, there was support for the hypothesis that self-categorization with a partner would increase collective orientation. However, it is possible that the increase in collective orientation was due to the perceived status of university students relative to TAFE students, rather than to self-categorization per se. Another way to test our argument is to examine collective orientation towards others categorized as outgroup members. If collective orientation is related to group membership, participants should be less collectively oriented towards a partner they perceive to be an outgroup member. We tested this hypothesis in Study 2.

STUDY 2

In Study 2, we measured collective orientation and influence amongst participants who believed they were interacting with a partner who was a member of a different university. We encouraged half of the participants to self-categorize as members of their university, thus encouraging them to categorize their interaction partner as an outgroup member. The other half were encouraged to focus on themselves as individuals. Following interaction to complete a visual-perception task, we measured collective orientation and the amount of influence the participants accepted from the partner. We hypothesized that participants would be less collectively oriented, and would accept less influence from the partner, when they self-categorized at an intergroup level, compared to when they perceived themselves and their partner as individuals.

Method

Participants and Design

Sixty-nine undergraduate psychology students participated in the experiment for course credit. The study adopted a 2 (interpersonal vs. intergroup level self-categorization) by 2 (high vs. low identification) between-participants design.

Materials and Procedure

Participants reported to the laboratory one at a time, where they were greeted by the experimenter and shown to a computer terminal in a private room. The experimenter informed the participants that the study was investigating decision making, and that the aim of the study was to examine how well people perform the task when they do it on their own compared to when they receive information about how another person has responded. Participants were told that today's session involved receiving information from another participant. They were further told that, due to the collaboration between universities in this study, the other participant was from another university and had been placed in another room.

Next, the experimenter explained the task in the same way as for Study 1, and participants completed 10 practice trials without feedback. When finished, they were asked to complete a short questionnaire in which they had to list up to three things that either they personally (interpersonal condition), or they and most other students at their university (intergroup condition) do relatively well, badly, rarely, and often. This questionnaire, adapted from Haslam et al. (1999), constituted the manipulation of self-categorization. By getting participants to think about these questions in relation to themselves or their group, their personal or social identities were made highly salient and categorization at the interpersonal or intergroup level respectively should be more likely.

When the task had been performed, the participants completed a questionnaire measuring their level of collective orientation towards the partner and their level of identification with their University. When finished the participants were debriefed and thanked for their time.

Results

There was no difference in identification as a function of the categorization manipulation, $t < 1$. A two-level identification factor was created by grouping participants above and below the median on the University identification scale (Median = 22; M for high identifiers = 24.55, SD = 1.38; M for low identifiers = 18.87, SD = 3.10). The effects of categorization and identification on collective orientation and stay responses were assessed using two separate ANOVAs. Means and standard deviations are shown in Table 1.

There was a significant interaction between categorization and identification on collective orientation, $F(1, 65) = 4.32$, $p = .04$, Partial Eta-squared = .06. Simple main effects analyses revealed that this interaction was due to an effect of categorization amongst high identifiers only. High identifiers were significantly less collectively oriented in the intergroup condition (M = 3.00, SD = 1.24) than in the interpersonal condition (M = 4.23, SD = 1.03), $F(1, 65) = 5.84$, $p = .02$, Partial Eta-squared = .08.

Analysis of stay responses revealed a significant interaction between categorization and identification only, $F(1, 65) = 6.48, p = .01$, Partial Eta-squared = .09. Simple main effects showed that the difference in stay responses between categorization conditions was only significant for high identifiers, $F(1, 65) = 6.17, p = .02$, Partial Eta-squared = .09. Those in the intergroup condition, and who identified strongly with their group, were less influenced by their partner ($M = .81, SD = .13$) than participants in other conditions ($M_s < .71, SD_s < .22$).

Table 1. Means and Standard Deviations of Collective Orientation and Stay Responses as a Function of Level of Self-Categorization and Social Identification.

	Interpersonal Categorization		Intergroup Categorization	
	Collective Or.	P(s)	Collective Or.	P(s)
High Identifiers	4.23 (1.03)	.64 (.17)	3.00 (1.24)	.81 (.13)
Low Identifiers	3.00 (1.77)	.71 (.22)	3.17 (1.29)	.66 (.16)

Mediation Analysis

To examine whether the effects of categorization and identification on stay responses were mediated by collective orientation, a mediation analysis was conducted using multiple regression analyses (Baron and Kenny 1986). First, stay responses were regressed onto categorization, identification, and the interaction term. Only the interaction was a significant predictor of stay responses, $Beta = .302, t = 2.55, p = .01$. Second, collective orientation was regressed onto categorization, identification, and the interaction term. Again, only the interaction term was a significant predictor of collective orientation, $Beta = -.245, t = -2.01, p = .04$. Third, stay responses were regressed onto collective orientation, $Beta = -.514, t = -4.91, p < .001$. Finally, stay responses were regressed onto categorization, identification, the interaction term, and collective orientation. With collective orientation as a predictor of stay responses, $Beta = -.508, t = -4.68, p < .001$, the interaction term was no longer significant, $Beta = .178, t = 1.67, p = .10$. A Sobel test (Sobel 1982) indicated that the indirect path through collective orientation was marginally significant, $t = 1.91, p = .056$.

Discussion

Study 2 provided support for the hypothesis that self-categorization and identification with the ingroup would reduce collective orientation towards an outgroup partner and increase stay responses. High identifiers, but not low identifiers, were less collectively oriented and less influenced by the partner when their social identity was made salient compared to when their personal identity was made salient. Furthermore, collective orientation appeared to mediate the effect of categorization and identification on stay responses, suggesting that amongst high identifiers intergroup categorization led to reduced collective orientation, which in turn increased stay responses. Therefore, Study 2 provides evidence that perceiving an other as an outgroup member reduces collective orientation, and hence attenuates acceptance of influence, but only amongst those who strongly identify with their ingroup.

GENERAL DISCUSSION

The argument being put forward in this paper is that task groups can be conceptualized as self-categories, and that self-categorization and social identification with other task group members satisfies the scope conditions of status characteristics theory. In particular, it creates the psychological conditions in which group members consider it important and legitimate to take into account the views and opinions of other task group members, and to be influenced by and attempt to influence them.

In two studies we have demonstrated the relationship between group membership, collective orientation, and social influence in two ways, firstly by showing that self-categorization with an interaction partner increases collective orientation, and secondly by showing that categorization of an interaction partner as an outgroup member decreases collective orientation and increases stay responses amongst high identifiers. Together, the results of these studies support the view that psychological group formation facilitates collective orientation and effective influence.

In Study 1 social identification did not play a role in collective orientation. This may be because the group "university students" is less clearly defined than specific university groups, or because the manipulation of self-categorization used in Study 1 was more powerful than that used in Study 2, effectively overriding effects of identification. However, Study 2 found that intergroup categorization decreased collective orientation and influence compared to interpersonal categorization, but only amongst high identifiers. One way to interpret this is that social identification moderated the effects of categorization on collective orientation and influence. In line with the social identity approach, categorization alone is not sufficient to create intergroup behaviour - group members must also place some emotional and value significance in their ingroup.

The scope conditions of status characteristics theory describe a set of psychological states (i.e. collective and goal orientation) under which status generalization operates. While these states may be induced directly using specific instructions and reward contingencies, we argue that the underlying psychological process that gives rise to these states in naturally occurring task-groups is psychological group formation, understood as self-categorization and social identification with other task-group members (see also Turner and Bourhis 1996). When individuals self-categorize and identify with others, they consider it important and legitimate to take into account their views, and to be influenced by and attempt to influence them.

In our view, conceptualising task groups as self-categories opens up a number of directions for research on status generalization. Firstly, it would be important to examine the effects of psychological group formation on status generalization itself, to see whether self-categorization and identification with other task group members augments the effects of other status characteristics on influence. Although Kalkhoff and Barnum (2000) found that a status characteristic (education level) still affected the amount of influence participants accepted from the partner in the other artistic preference group, we cannot tell whether that partner was categorized as an outgroup member (on the basis of artistic preference) or an ingroup member (in terms of the task-group). What is needed is to examine the effects of self-categorization and identification at the task-group level, and the inclusion or exclusion of others from that group, on status generalization.

A related question is whether specific group norms moderate the effects of status characteristics. For example, behavioural differentiation across gender or racial lines may be less pronounced within organizations that value and support diversity (cf. Johnson, Clay-Warner, and Funk 1996; Johnson, Funk, and Clay-Warner 1998). To the extent that individuals identify with such an organization they may be less inclined to generalize from societal norms and values. Integrating status-generalization and social identity processes as we have here may help in understanding how group norms impact on behavioural differentiation in interaction.

Conceptualizing task-groups as self-categories provides a potentially fruitful way of understanding the intersection of status-organizing and social identity processes. The social identity approach to group behaviour informs the relationship between collective orientation and status generalization, and provides a framework for exploring questions about the role of group-level processes in the emergence of behavioural inequalities. Clearly there is scope to elaborate on these important relationships between status characteristics theory and the social identity approach.

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APPENDIX A. CORRELATIONS BETWEEN IDENTIFICATION, SELF-CATEGORIZATION, COLLECTIVE ORIENTATION, AND PROPORTION OF STAY RESPONSES, STUDY 1 (N = 42).

	P(s) (M=.58, SD=.15)	Collective orientation (M=5.47, SD=1.29)	Identification(a) (M=1.50, SD=.50)
Categorization(b)	.127	.316*	.050
P(s)		-.571**	.000
Collective orientation			-.018

a (1 = low identifiers; 2 = high identifiers); b (1 = non-categorized; 2 = categorized)
* p < .05, ** p < .01.

APPENDIX B. CORRELATIONS BETWEEN IDENTIFICATION, SELF-CATEGORIZATION, COLLECTIVE ORIENTATION, AND PROPORTION OF STAY RESPONSES, STUDY 2 (N = 69).

	P(s) (M=.69, SD=.17)	Collective Orientation (M=3.35, SD=1.46)	Identification(a) (M=1.50, SD=.50)
Categorization(b)	.102	-.143	.032
P(s)		-.514**	.100
Collective orientation			.196

a (1 = low identifiers; 2 = high identifiers); b (1 = interpersonal; 2 = intergroup)
** p < .01.

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