



# The sociology of emotions: Four decades of progress

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## Abstract

The emotions that human beings experience play a fundamental role in all social phenomena. As a result, sociology needs to incorporate the analysis of *affective structures* and *emotional dynamics* into its objects of study. The integration of feelings, affects, moods and emotional states into sociological research, which began four decades ago with the birth of *the sociology of emotions*, must continue advancing until emotions are fully integrated into the general sociological perspective. This article offers an introductory and critical overview of the work sociologists of emotions have carried out so far. They have helped us, first of all, to understand what an emotion is, the countless number of existing feelings, and the great complexity of emotional processes. Second, they have revealed *the social nature of human emotions*, and *the emotional nature of social phenomena*. Third, they have developed a number of theoretical approaches to studying the emotions. And, lastly, they have carried out sociological analyses of many specific emotions (fear, trust, shame, etc.), and emotional analyses in many areas of sociology (gender, work, organizations, social movements, etc.). This article also offers suggestions for the future development of the sociology of emotions, and a selected and updated bibliography.

## Keywords

Affects, collective emotions, emotional cultures, feelings, sociology of emotions

## What are emotions?

We may know what emotions are and understand their importance from our own experience. In fact, as human beings we can only experience life emotionally: *I feel, therefore*

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*I am*. However, many questions still remain regarding their essential nature (Lawler, 1999), making it difficult to arrive at their satisfactory definition (Marcus, 2000: 224). The profound complexity which characterizes *human life in the world* is reflected in the broad and subtle universe of emotions. For this reason, understanding the complex nature of human emotions is absolutely necessary for the adequate development of sociology.

### Definitions and types of emotions

Denzin (2009 [1984]: 66) defines emotion as ‘a lived, believed-in, situated, temporally embodied experience that radiates through a person’s stream of consciousness, is felt in and runs through his body, and, in the process of being lived, plunges the person and his associates into a wholly new and transformed reality – the reality of a world that is being constituted by the emotional experience’. For Kemper (1987: 267), Seymour Epstein’s definition of a primary emotion is useful: ‘a complex, organized response disposition to engage in certain classes of biologically adaptive behaviors ... characterized by a distinctive state of physiological arousal, a distinctive feeling, or affective state, a distinctive state of receptivity, and a distinctive pattern of expressive reactions’. Lawler (1999: 219) defines emotions as relatively brief, positive or negative evaluative states, which have physiological, neurological and cognitive elements. Brody (1999: 15) sees emotions as motivational systems with physiological, behavioral, experiential and cognitive components that have a positive or negative valence (they make one feel good or bad), which vary in intensity and tend to be induced by interpersonal situations or events that merit our attention because they affect our well-being. While Scherer (2005: 697) defines emotion as an episode of organismic change ‘in response to the evaluation of an external or internal stimulus event as relevant to major concerns of the organism’.

Although the general term currently most widely used is simply that of ‘emotion’, it is important to distinguish between different classes of affective states.

*Primary* emotions are considered to be universal, physiological, of evolutionary relevance and biologically and neurologically innate, while *secondary* emotions, which can be a result of a combination of primary emotions, are socially and culturally conditioned. According to Kemper (1987), the primary emotions are fear, anger, depression and satisfaction, while Turner (1999: 145) identifies them as satisfaction–happiness, aversion–fear, assertion–anger, disappointment–sadness and startlement–surprise. Emotions such as guilt, shame, love, resentment, disappointment and nostalgia are considered to be secondary emotions.

Gordon (1981: 566–567) distinguishes between emotions and *sentiments*, which according to him are ‘socially constructed pattern[s] of sensations, expressive gestures, and cultural meanings organized around a relationship to a social object’. Lawler (2001: 326–328) distinguishes between *global emotions*, or generic responses to the outcome of an interaction, which are involuntary and not conditioned by interpretation or cognitive attribution, and *specific emotions*, which actors associate with specific objects and are defined through interpretive effort. Kemper (1978) also distinguishes between *structural*, *situational* and *anticipatory* emotions.

Jasper (2011: 286–287) establishes the following typology of emotions: *bodily urges*, such as sexual desire or the need to defecate; *reflex emotions*, which are short-term

reactions to our immediate environment, both physical and social, such as anger, fear or joy; *moods*, or lasting affective states, not very intense and lacking a specific object; and *reflexive emotions*, like ‘affective loyalties’, such as love, respect and trust, or ‘moral emotions’, involving feelings of approval and disapproval.

In short, we can state that *emotions constitute the bodily manifestation of the importance that an event in the natural or social world has for a subject*. Emotion is a bodily consciousness that signals and indicates this importance, regulating in this way the relationships that a specific subject has with the world. In its most basic expression this involves three elements: (a) the assessment/appraisal; (b) of an event in the world; and (c) made by an individual.

Without doubt, the ‘*self*’, *the feeling subject*, constitutes the central reference upon which emotions turn. According to Denzin (2009 [1984]), the linkage of emotion to self is, in essence, a matter of definition. However, it is evident that the nature of emotions is *relational* (Burkitt, 2002, 2014; de Rivera and Grinkis, 1986). The concrete emotion that a subject feels will depend on what the perceived consequences of interactions with others are for the survival, well-being, needs, goals and personal plans of the self (Stryker, 2004: 3). The subject of emotions is not, therefore, a being or body hermetically isolated from its environment, but is a subject who must by necessity achieve its goals in relationship with others and other things in its environment.

### *The complexity of emotions*

The apparent simplicity of human emotions hides abundant complexities, problems and paradoxes.

The emotions a subject feels should never be considered as simple mechanical or physiological responses to variations produced in the environment. As different theories have stressed, a subject’s emotional experience depends on many factors: How an act is evaluated consciously and/or unconsciously; to whom or what the cause/responsibility for an act is attributed; the subject’s expectations in the situation; the subject’s active social identity at each moment; and the subject’s identification with other persons or groups.

According to *appraisal theories of emotion* (Brody, 1999: 23; Scherer, 2001), human beings are not mere sentient biological mechanisms, as we cognitively evaluate the elements in our environment before we experience or express our emotions. Applying to all emotions Freud’s idea that anxiety warns individuals of a serious danger to their mental health, Hochschild (1983) argues that emotions function as messengers for the self; they carry out a *signal function* and are, therefore, adaptive and useful in both the evolutionary long-term and the interactive short-term (Burke and Stets, 2009; Heise, 2007; Scheff, 1990; Stryker, 2004). But in addition to carrying out a signal function, emotional experiences also have an impact and leave a *mark*, sometimes one that is enduring and which conditions the future disposition of the subject.

According to *attribution theories* (Lawler et al., 2008: 523), the emotion experienced does not depend only on the event itself, but also on the causal attribution made by the subject. If the individual believes that someone else has been the cause of an undesirable event, he/she will feel anger, and if the subject believes him/herself to be the cause, the

response will be guilt or regret; finally, if the event is perceived to be caused by fate, the response will be sadness or despair (Brody, 1999: 24).

According to *expectation states theory* (Turner and Stets, 2006: 36), the assessment of an object, event or person will depend on the prior expectations of the subject, which can affect the resulting emotional experience. In the sphere of social interaction, a key factor is if individuals meet the expectations awakened in others based on their position of power or status.

According to *identity theories* (Stryker, 2004), which recognize and address the fact that both role identities as well as social and group identities operate in culturally defined positions within the social structure, emotions are also linked to the expectations that actors have in each social interaction: to the extent that an interaction validates or does not validate their identity they will feel positive or negative emotions (Burke and Stets, 2009).

Some theories, such as *intergroup emotions theory*, show that the emotions subjects' experience are the result not only of what happens to them personally but of what happens to the social groups to which they belong and/or identify with (Devos et al., 2002; Mackie et al., 2000; Yzerbyt et al., 2003). Thus, as Durkheim argued in *The Elementary Forms of the Religious Life*, group, collective and socially shared emotions exist (Bar-Tal et al., 2007; Braithwaite, 2004; Von Scheve and Ismer, 2013; Von Scheve and Salmela, 2014), as do processes of emotional contagion (Hatfield et al., 1994).

The complexity of human emotions is also a result of the dialectic existing between emotional experience and expression, the capacity that emotions have to transmute and form successive emotional structures, and the multiple compositions that shape the nature of any affective state.

In the world of emotions, a fundamental distinction must be made between internal *emotional experience* (subjective feelings) and *emotional expression* (the external manifestation of emotions). What we feel can be expressed through words, facial expressions, vocal tones, actions and physiological changes. Emotional expressions are key in social interactions (Von Scheve, 2012). However, the existing relationship between internal experience and external expression is confusing and problematic (Brody, 1999). First, emotional expression cannot be reduced to the simple and mere manifestation of an internal state, as expression, oriented toward communication with another, emerges in the context of social interaction (Marinetti et al., 2011: 32; Thoits, 1996). A small child that falls may cry because he has hurt himself, or he may cry because he wants his parents' attention. Second, it has not been demonstrated that internal feelings produce physiological or external bodily changes. For Damasio (1994), it is the physiological changes that trigger the feelings: we do not tremble because we feel afraid; we feel afraid because we tremble. In short, external manifestations have an *emotion-expressive function*, but also a *social communicative function* (Marinetti et al., 2011: 32).

The study of emotions is never simple, because emotions are part of an active process and can undergo multiple and enigmatic *transmutations* that are both voluntary and involuntary, or conscious and unconscious. Shame can become anger, happiness can turn to weeping, pain into pleasure. Repression, denial, displacement, projection, sublimation and attribution are some of the defense mechanisms that can alter our

emotions (Turner, 2008: 326). In addition, it is obvious that we do not experience isolated emotions, one at a time, nor do the emotions constitute static states in time (Williamson, 2011). Our emotional lives are dynamic processes of multiple *sequences* and *emotional structures*.

Finally, the complexity of emotions is also reflected in their composition. Scherer's *multicomponent theory of emotions* (2001) considers the following five components: cognitive, neurophysiological, motivational, expressive and subjective. Shott (1979: 1318) argues that at least two elements – physiological arousal and cognitive labeling as affect – are necessary for an actor to experience an emotion. Thoits (1989: 318) distinguishes between appraisals of situational stimuli, physiological or bodily changes, expressive gestures, and cultural labels applied to specific combinations of the first three components. In short, subjective conscious feeling constitutes only one of the essential elements involved in the experience of emotions. Furthermore, emotional states can be classified according to several dimensions, such as their *valence* (positive/negative), *potency* (strong/weak) and *arousal* (active/passive) (Heise, 2007; Lively and Heise, 2004; Rogers and Robinson, 2014; Scholl, 2013; Smith and Schneider, 2009).

## The sociology of emotions

We have stated that the *self*, the individual organism, is the central reference upon which emotions turn. This being true there are two questions we must answer: What can sociology contribute to the study of emotions? Why should sociology integrate emotions into its study of social reality? According to Barbalet (1998: 8–9), sociology has something to say about emotion for two reasons: First, because sociology seeks to explain social phenomena, and emotion is a social phenomenon, and second, because emotion is necessary to explain the fundamentals of social behavior.

On the one hand, the sociological study of emotions is grounded in the fact, indicated by Kemper (1978, 1987, 2011), that the majority of our emotions emerge, are experienced and have meaning in the context of our social relations. Loneliness, envy, hate, fear, shame, pride, horror, resentment, grief, nostalgia, trust, sadness, satisfaction, joy, anger, happiness, frustration and a myriad of other feelings emerge in specific social situations, expressing in the individual's bodily consciousness the rich spectrum of forms of human social interaction and relationships. Understanding an emotion means understanding the situation and social relation that produces it.

On the other hand, the incorporation of emotions into sociological studies involves investigating and 'theorizing all that becomes apparent when we make the simple assumption that what we feel is fully as important to the outcome of social affairs as what we think or do' (Hochschild, 1990: 117). An actor whose consciousness is limited to *ideas* or cognitions and lacking in *social values* or *emotions* is inconceivable. For this reason, any description, explanation or sociological understanding of a social phenomenon is incomplete, and therefore false, if it does not incorporate the *feeling subject* into its study of structures and social processes (Bericat, 2000: 145).

In short, the sociology of emotions faces two fundamental tasks: studying the social nature of emotions and studying the emotional nature of social reality.

### *The social nature of human emotions*

The use of the sociological perspective is essential to understand the innumerable emotions that make up the affective universe of human beings. Despite the implicit meaning in many of the metaphors used in current language (Kövecses, 1990), emotions are not, according to Gregory Bateson, a specific substance, but rather, *patterns of relationship* which link the self with its environment, fundamentally with *others* – in other words, with the social world (Burkitt, 2002: 151). Kemper's social relational theory (1978) argues that primary emotions are a product of the outcome of interactions in two basic social dimensions, power and status: Fear is the outcome of an interaction in which an actor is subject to a power greater than his/her own; anger appears when we believe someone else is responsible for denying us merited status or prestige; depression emerges when an actor loses status, but sees him/herself as responsible for the loss; and finally, 'satisfaction results from interactions in which the power outcome is nonthreatening', and status outcomes are similar to what was expected or desired (Kemper, 1987: 275).

Both the meaning and understanding of every one of the innumerable feelings which form our broad emotional universe are intimately connected to specific relational patterns, in other words, to their specific social nature. What we feel in a social situation will depend on the content and outcome of the interaction, the balance we obtain from the exchange, the type of social relationship that connects us to the other, the relevant norms and values, and a broad set of other social factors. Thus, by analyzing the existing social structures and social factors which condition an emotion, and analyzing the expression, behavior and social consequences stemming from it, we can reach a greater understanding of each emotion. Understanding the social life of emotions and establishing adequate *sociological definitions* of them are essential to gain understanding of not only the complex world of emotions but also that of human beings in the context of the processes and structures of social interaction (Barbalet, 2009; Bericat, 2005; Charmaz and Milligan, 2006; Jacoby, 2012; Lewis and Weigert, 1985).

### *The emotional nature of social reality*

In all social phenomena, without exception, emotions are present and play a fundamental role. This is true in those collective phenomena in which intense passion occupies a central place (e.g. festivals, sporting competitions, the response to terrorist actions and political revolutions), as well as in more intimate social relations, such as within the family and in friendships, which are charged with lasting though often almost imperceptible feelings, and which give flavor to every minor daily encounter.

The two basic dimensions of sociability are the symbolic or *intercommunicative* dimension and the energetic or *interactive* dimension. Hence, social reality is always *culture, communication* and *consciousness*, and at the same time, *structure, energy* and *action*. This is why emotions are a constituent part of all social phenomena. Due to their informational and expressive nature, emotions are one of the three fundamental components of the intercommunicative dimension of sociability (cognitions, values and emotions). But due to their energetic and motivational nature, emotions are also determinants

of individual will, one of the three components of the interactive dimension of sociability (natural energy, social power and individual will).

In short, emotions are a constituent part of any social phenomenon, whether it be conflict between partners (Retzinger, 1991), violence (Collins, 2008), the Christmas season (Schervish et al., 1996), law and legal processes (Grossi, 2015; Nussbaum, 2006), the attack on September 11 (Burkitt, 2005; Kemper, 2002), politics (Demertzis, 2013), comedy series on television (Weaver, 2010), or trends in the stock market (Berezin, 2009). And this fact requires the development of a sociology which studies the complex existing *affective structures* and *emotional dynamics* in the context of social life. As Thoits (1989: 333–334) has pointed out, emotion concepts are being incorporated as intervening variables in substantive sociological research on such diverse topics as charisma, gender roles, the division of labor in the home, responses to stress, the reaction of battered women to violence, group solidarity and inequality in intimate relationships. The incorporation of emotions into this research makes it possible to provide more specific and more detailed explanations of these important social phenomena.

### *The place of emotions in sociology*

The sociology of emotions was born in the second half of the 1970s, initiated by the research of three pioneers: Arlie R Hochschild, Thomas J Scheff and Theodore D Kemper (Bericat, 2000).

Hochschild was the first to use the term in 1975, reflecting on the relationship between emotion and gender. In 1979 she published an article in which, through concepts such as *feeling rules* or *emotion work*, she demonstrated the existing relationship between culture, politics and emotions. The culture defines what, when and how we should feel. In her book, *The Managed Heart: The Commercialization of Human Feeling* (1983), she analyzed the *emotion management* that must be carried out by certain service workers, such as flight attendants. Scheff published an article in 1977 in which he linked social rituals to a process of emotional catharsis, and another in 1988 in which he synthesized his sociological theory of shame and pride. In *Microsociology, Discourse, Emotion and Social Structure* (1990) he presents an argument for incorporating emotions into the core of sociological meta-theory, based on the idea that maintaining social bonds is the most important of human motivations. Kemper's book, *A Social Interactional Theory of Emotions*, published in 1978, presents his structural theory of emotions, based on two basic dimensions of social interaction: power and status. In an article from 1981, he summarized a theoretical debate that emerged between positivism and social constructivism, and in another article from 1987 he tried to integrate both positions by distinguishing between primary and secondary emotions. In 1990 he edited an important collection with contributions from many of the pioneers in the sociology of emotions.

Included among these pioneers are: Randall Collins (1975, 1981, 2004, 2008), who has developed a theory of ritual interaction based on the concept of 'emotional energy (EE)'; David R Heise (1979, 2007), who has developed the 'Affect Control Theory'; and others like NK Denzin (2009 [1984]), SL Gordon (1981), S Shott (1979), PA Thoits (1985, 1989, 1996), C Clark (1987), M Hammond (1983) and L Smith-Lovin (Smith-Lovin and Heise, 1988). To these must be added others who have expanded the body of

literature on the sociology of emotions through diverse and important contributions over the last four decades: JH Turner, JE Stets, JM Barbalet, KJ Lively, EJ Lawler, DD Franks, DT Robinson, PJ Burke, J Clay-Warner, JM Jasper, H Flam, I Burkitt, S Schieman, E Summers-Effler, J Kleres, E Illouz or M Berezin.

Various academic journals have dedicated special issues to the study of emotions: *Symbolic Interaction* 1985, 8(2) (Symbolic interaction and emotions); *Rationality and Society* 1993, 5(2) (Rationality and emotions); *International Journal of Sociology and Social Policy* 1996, 16(9/10) (Social psychology and sociology of emotions); *Advances in Group Processes* 2004, 21 (Identity theory and emotions); *European Journal of Social Theory* 2004, 7(2) (Anger in political life); *Journal of Social Issues* 2007, 63(2) (Emotional climate and security); *Theory and Society* 2009, 38(4) (Emotions and the economy); *Emotion Review* 2012, 4(3) (Social-constructionist approaches to emotions); *Emotion Review* 2014, 6(3) (Culture, social structure, and emotions); and *Emotion Review* 2015, 7(1) (Methodological innovations). In addition, several important collections have also been published: Franks and McCarthy (1989), Kemper (1990), Bendelow and Williams (1998), Goodwin et al. (2001), Barbalet (2002), Stets and Turner (2006, 2014), Clay-Warner and Robinson (2008), Greco and Stenner (2008), Hopkins et al. (2009), Demertzis (2013) and Von Scheve and Salmela (2014).

It is clear that since its birth, the sociology of emotions has developed tremendously. However, if social interaction and emotions are intimately linked, as has been argued here, we must ask why the sociology of emotions emerged so late. We should also ask if sociology in its foundational or classical epoch incorporated the emotions into its analysis.

A reading of the works of the classical sociologists, as well as those of other thinkers of the 19th century, reveals that these first social scientists incorporated the emotions into their work in a spontaneous and natural manner. However, the gradual advance of modern culture, the exclusive and excluding legitimacy that the positivist paradigm began to acquire in the social sciences and the hegemony ultimately reached by cognitivism in the middle of the 20th century led to the almost complete disappearance of the emotions in both social theory and research. Only with postmodern social and cultural change was the door opened to new approaches, facilitating a re-encounter between the social sciences and emotions.

Although the major 19th-century social thinkers, Marx (worker alienation), Durkheim (social rituals), Weber (Protestant desire for love) and Freud (anxiety), considered affective phenomena in their work (Denzin, 2009 [1984]; Shilling, 2002), emotions occupied a relatively marginal analytical place, as can be seen in Weber's typology of social action. Only Charles H Cooley, with his theory of the *looking-glass self* explicitly placed emotional dynamics at the centre of social interaction (Turner and Stets, 2005: 106–107). However, a detailed analysis of *Suicide*, by Durkheim, and the *Protestant Ethic and the Spirit of Capitalism* of Weber reveals the significant role that emotions play in these two paradigmatic sociological studies. These authors also demonstrate that any sociological theory that does not consider the emotions involved in the social phenomena it is attempting to explain or understand will be incomprehensible (Bericat, 2001a, 2001b).

What, therefore, is the place of emotions in sociology? Schieman (2006: 493), in his work on anger, emphasizes that an essential question for sociology is the following:

‘What can we learn about social life by studying anger?’ As we have seen, the analysis of any emotion offers us a unique perspective from which we can observe certain essential aspects of specifically human social interaction. However, despite the great interest in understanding the social nature of each of the emotions, the primary interest of the sociologist should be to understand *the emotional nature of social life*, in other words, the *emotional structure* and *dynamics* present in the social phenomena that are the object of study.

In conclusion, sociological analysis should always include the emotions felt by participants in specific social phenomena, practices, situations, actions, events, structures and processes.

## Theoretical approaches

With the objective of understanding and explaining both the affective structures and the emotional dynamics of social reality, sociologists have, over the last four decades, developed a wide range of theoretical approaches. Turner and Stets (2005, 2006; Stets and Turner, 2006, 2014) have classified these into five major types:

1. *Cultural theories* see emotions not as mere biological responses but as *social feelings*. These feelings are conditioned by the culture of a society (its norms, values, ideas, beliefs, etc.), emerge in the course of patterned social interactions and are learned through a socialization process (Gordon, 1981; Illouz et al., 2014; Robinson, 2014). Societies have an *emotional culture*, an *emotional vocabulary*, *feeling rules* and *display rules*, which define, for every situation and for every social position a subject occupies, what should be felt and how feelings should be expressed (Hochschild, 1979, 1983). However, although culture conditions our emotional experiences and expression, it does not determine them. Whether with the aim of adjusting to a norm, managing emotional deviation (Thoits, 1985), adapting to a job or obtaining an advantage during a social interaction, individuals are capable of strategically manipulating their emotions (Hochschild, 1979, 1983) as well as their expression (Goffman, 1959; Lively and Weed, 2014).
2. For *symbolic interactionist theories*, the *identity of the self* constitutes the dynamic behind emotional arousal. Individuals, at all times, try to confirm both the image they have of themselves (self-concept) and the particular identities through which they act in any specific social interaction (role identity). In Heise (1979) and Smith-Lovin’s *affect control theory*, the emotional dynamic stems from the existing degree of correspondence between *fundamental sentiments* and the *transient feelings* from a specific situation (Smith-Lovin and Heise, 1988). When our self-conception is confirmed by others, we experience positive emotions; when it is negated, we experience negative emotions, such as distress, anxiety, anger, shame or guilt (Burke and Stets, 2009; Turner and Stets, 2006: 30). Stryker’s *identity theory* (2004) emphasizes the existence of multiple identities, some more important than others depending on the social situation and the social network in which they are activated (*salience hierarchy*). For Cooley (1964 [1902]), Goffman (1956, 1959), Shott (1979), Hochschild (1979) and Scheff

(1988), the emotions that emerge during social interactions play a fundamental role in social control.

3. *Ritual theories* argue ‘that focused interaction, which these theories refer to as ritual, is at the heart of all social dynamics. Rituals generate group emotions that are linked to symbols, forming the basis for beliefs, thinking, morality, and culture’ (Summers-Effler, 2006: 135). Taking the sacrificial rituals of aboriginal Australians as a paradigm, Durkheim (1965 [1912]) described the basic mechanisms through which these collective events produced and maintained the social cohesion of the group. Rituals are *social gatherings* in which individuals maintain the same focus of attention, share the same values and feel the same emotions (Collins, 2004; Knottnerus, 2010). These social gatherings provoke a *collective effervescence* and a high level of *group consciousness*. Collins (1981, 2004) distinguishes between the positive emotions and moral feelings, which, directed toward the group itself, shape social solidarity, and the positive emotions and trust that individual participants feel in the form of *emotional energy* (EE). According to Collins, individuals always seek to maximize their emotional energy in every social encounter. Goffman (1959) grounded his social research project in this initial Durkheimian insight, stating that all social *encounters* constitute an interaction ritual.
4. *Structural theories of emotions*, whose initial formulation we owe to TD Kemper (1978), explain the type of emotion felt by actors in the course of social interaction, focusing on specific relational characteristics. According to Kemper, there are two basic relational dimensions: *power* and *status*. Actors with power, or who gain power in an interaction, experience positive emotions such as satisfaction, confidence and security, while actors with a low level of relative power experience negative emotions such as fear. Actors with a high level of status, or to whom others give deference, will feel positive emotions such as pride, while those that lack status, or lose it, will feel negative emotions such as shame. Thamm (2004) proposes universalizing Kemper’s social relational theory by specifying with greater detail the structural conditions associated with specific emotional responses. These depend on whether the *self* and the *other* meet their *expectations*, and whether they are *rewarded* as a result of interaction. Barbalet (1998) has developed a structural theory of emotions from a macro-sociological perspective.
5. *Exchange theories*, developed by George C Homans and Peter M Blau, have also been used to explain the complex world of emotions (Lawler, 1999). Social interaction is a process in which actors exchange valuable resources in order to obtain an advantage or benefit. Individuals try to obtain rewards or avoid punishments by maximizing the utility of their behavior and calculating costs and investments (Turner and Stets, 2005: 180). Individuals ‘feel good’ (positive reinforcement) when rewards exceed costs and investments, and they ‘feel bad’ (negative reinforcement) when they do not. But the intensity and type of emotions provoked by a social exchange depend on many other factors: the type of exchange (*productive, negotiated, reciprocal* or *generalized*); the characteristics of the structure and the nature of social networks (degree of coordination involved in the

exchange, density of the network); the relative power and dependency of the actors; whether or not expectations are met; the relevant norms of justice (e.g. equity, equality and procedure); and to what individuals attribute the cause of the outcome of exchange (the self, the other or others, the social unit, or the task in itself) (Lawler, 2001; Turner and Stets, 2006: 41). Lawler's affect theory of social exchange 'introduces an emoting actor, specifically, an actor who responds emotionally to exchange and who attempts to understand the source of their emotions and feelings' (Lawler, 2001: 347).

## Emotions and sociological analysis

That affective life constitutes, *prima facie*, a bodily reality rooted in the biology of individual organisms, can explain why the sociology of emotions has experienced its greatest development up until now in the micro-sphere of social phenomena. In addition, the fact that the emotional life of human beings constitutes such a subjective, labile and fluid reality could explain the predominance of theoretical reflection over empirical research, as well as the insufficient development of research methodologies and techniques especially adapted to the sociological study of emotions.

However, since the birth of the sociology of emotions, the *micro*-analyses have always contained an evident *macro*-projection, and the theoretical reflection an implicit, although underdeveloped, *empirical* vocation. As a result, the progress made in the past provides an excellent basis for the future development of a sociology of emotions in which macro-analysis and empirical research will have a more prominent role.

### *The sociological analysis of emotions*

The evident macro-sociological and empirical projection of the micro-sociological theories of Kemper, Scheff and Collins can illustrate a necessary path for integrating micro- and macro-analyses.

Although Kemper's theory begins with the analysis of a concrete situation in which two individual actors interact, it predicts the resulting emotions based on the two basic structural dimensions of sociability. These emotions are not a result of the individuals' biological nature, but of the power/status associated with their social positions and the variations in power/status they experience in the course of the social interaction (Clay-Warner and Robinson, 2008; Kemper, 2011). In the same way, social actors' *emotional energy* (EE), produced in every micro-social encounter, whether of a hierarchical (power) or egalitarian (status) character, is the result of the structurally accumulated energy in interaction ritual chains (Collins, 1981, 2004). For Scheff (1994: 4), who studies episodes of shame and rage in microscopic detail, the analysis of the parts and the whole (*part/whole analysis*) 'places equal emphasis on the smallest parts of a social system, the words and gestures in discourse, and the largest wholes, the institutions that exist within and between nations'.

Thus, the sociological importance given to fear and anger, on the one hand, and shame and pride, on the other, are explained not so much by their importance in individuals' psychic lives, but by the fundamental role they play in the social structure and in social

dynamics. Fear and anger are the central emotions in the *interactive dimension* of sociability (power), while shame and pride are the central emotions in the *intercommunicative dimension* (status).

*Fear* constitutes a broad emotional family composed of feelings such as worry, anxiety, panic, terror or horror, which differ both in content and in intensity. According to Kemper (1978, 1987), individuals feel guilt if they perceive themselves to possess excess power, and they feel fear–anxiety if they lack sufficient power. For Barbalet (1998: 161), fear indicates that the future interests of the actor are threatened. In this sense, Hume (1911 [1739]) pointed out that both fear and hope depend on the likelihood that an event will happen, a desirable event in the case of hope, and an undesirable event in the case of fear. Barbalet (1998) distinguishes between the cause of fear, which is vulnerability and an actor's relative lack of power in relation to something out in the world, and the object of fear, which is the expectation of suffering harm.

*Anger* is the node for an extensive family of emotions which range from simple annoyance or indignation, to rage or fury. It is most often stimulated by perceived or real insult, injustice, betrayal, lack of equality, obstacles to achievement, incompetence and physical aggression (Schieman, 2006: 496; 2010). Anger emerges when an individual loses power or status and when this loss is considered remediable and another actor is considered responsible (Jasper, 2014; Kemper, 1990). Anger activates the power dimension in the form of hostility or aggression of the self toward the other, who is considered responsible for a negative or unjustified outcome. There are four forms of anger: frustration (because of undesirable outcomes), resentment (because of outcomes which benefit others), reproach (attributing blame to others) and anger itself (for undesirable outcomes in which blame is attributed to others) (Clore et al., 1993: 68).

Scheff argues that *shame* and *pride* are the fundamental social emotions. Cooley's *theory of the looking-glass self* conceives the human being as always adopting the role of the other, arguing that we always see and evaluate ourselves from an external perspective. This basic mechanism of sociability involves three steps. The first is imagining how we appear to the other; the second is imagining how the other judges this appearance; and the final step is a response based on what we think of this judgment in the form of a feeling such as pride or shame (Cooley, 1964 [1902]). Any encounter can become embarrassing for any participant (Goffman, 1956: 265), who can suffer a loss of face and feel ashamed. Scheff's *theory of shame* is based on the assumption of the 'maintenance of bonds as the most crucial human motive' (Scheff, 1990: 4). There are *secure* and *insecure bonds*. Secure bonds produce *solidarity*, and insecure bonds, *alienation*. In each encounter our bond with the other can be 'built, maintained, repaired or damaged' (Scheff, 1994: 1). Shame and pride constitute a 'gyroscope' which informs the individual of the state of his or her social bonds. We feel legitimate pride when the bond is secure, and shame, a very painful emotion, when we are rejected by or lose worth in the eyes of the other.

The system of social control is effective thanks to the compelling force of these four key emotions: fear, anger, shame and pride. However, as can be seen in the emotional classifications developed by different authors (Kemper, 1987; Ortony et al., 1988; Plutchik, 1980), many emotions still remain to be analyzed. Social scientists have contributed to the understanding of some, such as, for example, confidence and trust (Barbalet, 1998, 2009; Dunning and Fetchenhauer, 2010; Luhmann, 1979), empathy and

sympathy (Clark, 1987; Smith, 1976 [1759]), grief and sadness (Charmaz and Milligan, 2006; Jacoby, 2012), boredom (Barbalet, 1999; Darden, 1999), love (Felmlee and Sprecher, 2006; Illouz, 2012), horror (Bericat, 2005) and disgust (Douglas, 2002; Nussbaum, 2006).

### *The emotions in sociological analysis*

Sociology has incorporated, and must continue incorporating in its different areas of study, the analysis of three types of *social emotions*: (a) *interactional emotions*, that is, the affective dispositions, emotional states and emotional processes related to the different positions that actors occupy in the social structure; (b) *group and collective emotions*, that is, those that subjects experience or express by being a member of a group or forming part of a collective in a specific social situation; and (c) *emotional climates* and cultures, that is, the transient emotional states or the general and lasting moods rooted in the essential characteristics of a specific society or social unit.

First, bearing in mind that emotions can only exist in the body of individual organisms, sociology must study the emotions experienced by individuals as actors who occupy certain social positions (Gordon, 1990: 161). Thus, for example, anger is assumed to be a 'masculine emotion', one which women should repress (Brody, 1999; Hochschild, 1975). Those who occupy higher positions of power express anger more easily, while those that are in subordinate positions try to control their anger (Collet and Lizardo, 2010; Schieman, 2006: 508). 'Because of the greater ability of those in power to define situations, including emotional ones, depression and anxiety often come to replace anger in the experience of subordinate actors' (Freund, 1990: 467; Simon and Lively, 2010). However, anger, rage and indignation form part of the moral emotions (Stets et al., 2008) which are provoked by injustice, the violation of norms, social deviation and guilt. This explains their presence in both moral panics and social movements (Berry, 1999; Jasper, 2011; Van Stekelenburg and Klandermans, 2013).

The sociology of gender has studied emotional differences based on gender in great detail (Hess, 2015; Shields et al., 2006; Simon, 2014). Traditional cultures and societies associate women with emotionality, excluding men from the world of feelings. Women are encouraged to feel and express powerless emotions, such as fear and sadness, while men, on the other hand, must repress and hide these emotions, instead feeling and expressing powerful emotions, such as anger and pride (Brody, 1999). Both the conceptual approaches (feeling and expression rules, emotion management, surface and deep acting) and the empirical research of Arlie R Hochschild (1975, 1983, 2003), carried out using participant observation, content analysis and unstructured interviews, have had a tremendous impact on the development of sociologies of gender and work. The role that emotions play in work or in the culture of the workplace, the emotional content of different occupations, the social and personal consequences of emotion management, and the emotional structure of the workplace in comparison with the family have been the object of many studies (Clay-Warner and Robinson, 2008; Hochschild, 2003; Wharton, 2009).

Second, individuals experience and express *group emotions* and *collective emotions* because they are members of a group or form part of a collective in a determined social situation (Von Scheve and Ismer, 2013; Von Scheve and Salmela, 2014). For example,

fear often emerges in social contexts, not as a mere individual reaction to a threat, but as the result of an intersubjective experience. 'Thus, the conception of fear as an individual reaction to physical threat offers very little for an understanding of social behavior and action' (Barbalet, 1998: 153).

The sociology of social movements has been an area in which the analysis of group and collective emotions has made an important contribution, deepening knowledge of specific social movements as well as leading to theoretical renewal in the fields of public opinion and political action (Berezin, 2014; Demertzis, 2013; Goodwin et al., 2001; Holmes, 2004; Jasper, 2011). Many emotions, such as indignation, moral shock, anger, fear, shame, pride and humiliation, condition and inspire social movements, whether in their origin, recruitment of members, maintenance of organization or in the struggle to achieve their objectives. Emirbayer and Goldberg (2005) theorize collective action and social movements, incorporating emotions based on the rejection of three erroneous postulates: that reason and emotion are mutually exclusive, that emotions are individual states of mind, that collective emotions lack analytical autonomy.

Lastly, it is clear that the basic structure and processes of a society create specific *emotional climates*, *emotional cultures*, or even *societal emotions*, which condition the general sentiments of the population (Bar-Tal et al., 2007; de Rivera, 1992; de Rivera and Páez, 2007; Smith-Lovin and Thoits, 2014; Solak et al., 2012). In this sense, a sociology of any emotion, such as for example, a sociology of fear, must analyze the cultural matrix in which fear emerges and address the patterns of social action commonly associated with it (Barbalet, 1998; Tudor, 2003: 244). Helena Flam (1998), using biographical interviews as her research technique, studied the role of fear in the communist regimes of Poland and East Germany. Thomas Scheff, using the microscopic analysis of verbal content and paralinguistic and visual behavior, studied the role of shame in micro family conflicts and in the macro-violence of the two world wars (Scheff, 1994).

Every emotion can be an essential component of very diverse social phenomena. For example, fear plays an important role in terrorism (Burkitt, 2005), unemployment (Barbalet, 1998: 158), the circulation of elites (Barbalet, 1998: 161), consumption (Miller, 1998), politics (Marcus, 2000), social movements (Jasper, 2011) and the economy (Berezin, 2009). However, it could be argued that today fear also constitutes a *societal emotion*, in other words, an emotion that essentially characterizes the *ethos* of our postmodern societies. The culture of fear (Furedi, 1997), or the culture of horror analyzed by Bericat (2005) using micro- and macro-analyses of the emotional content of the news published in North American newspapers, stems from characteristics which are essential aspects of our society as a risk society (Beck, 1992; Zinn, 2006) and a liquid society (Bauman, 2006). Every society or social unit fosters, in every age, specific characteristic emotions.

In short, through analyzing the emotions involved in social phenomena, sociology has broadened, deepened and renewed knowledge in different areas of study. The following particularly stand out: the sociology of gender (Brody, 1999; Shields et al., 2006), work (Clay-Warner and Robinson, 2008; Grandey et al., 2012; Hochschild, 1975, 1983, 2003; Lively, 2006; Wharton, 2009), organizations (Fineman, 2008), social movements (Emirbayer and Goldberg, 2005; Flam and King, 2005; Jasper, 2011) and mass media (Döveling et al., 2011; Knottnerus, 2010). Another areas, like health, law and justice, crime,

politics, economy, consumption, leisure, religion, sport or space (Brown, 2011; Greco and Stenner, 2008; Grossi, 2015; Nussbaum, 2006; Reckwitz, 2012; Stets and Turner, 2014) are also incorporating the analysis of *affective structures* and *emotional dynamics*.

## Future directions

Although the sociology of emotions has developed over the last four decades a rich set of concepts, perspectives and theories, contradictions and inconsistencies remain; this calls for a greater degree of integration between theory and empirical research, structural and cultural approaches and micro- and macro-perspectives. As in other fields, the paradoxes or inconsistencies highlight problems, the resolution of which leads to advances in knowledge. The sociology of emotions should address and seek to resolve these *multi-level* paradoxes and theoretical problems (Boiger and Mesquita, 2012; Markovsky, 1985; Rogers et al., 2014; Smith-Lovin and Winkelman, 2010).

Up until now, the sociology of emotions has carried out one-dimensional and static analyses of the emotional lives of human beings, and for this reason, they are often too simple and even mechanical. For example, many specific emotions have been analyzed, but it is obvious that individuals do not feel emotions in an isolated and independent manner. The feelings we experience are part of complex structures consisting of many emotions. In addition, subjective experiences happen over time as sequences or emotion chains that have particular dynamics. Therefore, sociologists should analyze the *affective structures* and the *emotional dynamics* of social phenomena (Bloch, 2012; Crawley, 2004; Jasper, 2014; Kolb, 2011; Lively, 2008; Lively and Heise, 2004; Lois, 2003; Scholl, 2013; Stets, 2012; Williamson, 2011).

The sociology of emotions has made greater advances in the development of broad meta-theoretical perspectives than in contributing substantive theories on concrete phenomena and social emotional processes, or in carrying out empirically valid and reliable research. The development of relevant, quality empirical research is therefore indispensable for the advancement of this sub-discipline. As a result, it is critical to develop new or adapt available research methodologies and techniques to the social analysis of emotions: self-report and survey techniques, observational and visual techniques, and linguistic and discourse techniques (Kleres, 2010; Lively and Heise, 2004; Olson et al., 2014; Patulny et al., 2015; Rogers and Robinson, 2014; Scherer, 2005).

The sociology of emotions in both its theoretical development and in its empirical studies has, up until now, focused more on the structures and processes of micro-interactions than on macro *social emotions*. Although this shortcoming has recently been recognized and efforts to address it are being made, it is evident that a macro-sociology of emotions remains to be developed.

In conclusion, after four decades of progress, sociologists can rely on the outstanding work done by sociologists of emotions to finally incorporate *affective structures* and *emotional dynamics* into sociology.

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## Author biography

Eduardo Bericat is a sociologist and social researcher. He is Professor of Sociology at the University of Seville, Spain. He has been Visiting Researcher at the University of California and the University of Essex. He has carried out more than 40 social research studies on social values, sociology of emotions, visual sociology and composite indicators on quality of life and social quality. Currently, he is investigating the social stratification of happiness in Europe, and leads a research team that is building a System of Indexes on the Quality of European Societies (SICSE). Among his recent publications are 'The subjective well-being of working women in Europe', in Connerly M and Wu J (eds) *Handbook on Well-being of Working Women* (Springer, 2015); 'Structural gender equality in Europe and its evolution over the first decade of the twenty first century' (*Social Indicators Research*, 2015); 'Valores sociales, diversidad cultural y conflictos ideológicos' (*Centro de Investigaciones Sociológicas*, 2015); 'The socioemotional well-being index (SEWBI): Theoretical framework and empirical operationalization' (*Social Indicators Research*, 2014); 'Matrimonio, desigualdad de género y bienestar socioemocional de los miembros de la pareja' (Universidad Autónoma Metropolitana, 2014); 'The European Gender Equality Index: Conceptual and analytical issues' (*Social Indicators Research*, 2012); and 'La visualización en la obra de Erving Goffman y el análisis socio-iconográfico' (*Centro de Investigaciones Sociológicas*, 2012).

## Résumé

Les émotions vécues par l'être humain jouent un rôle essentiel dans tous les phénomènes sociaux. La sociologie doit donc intégrer l'analyse des structures affectives et des dynamiques émotionnelles dans les objets de sa recherche. La prise en compte des sentiments, des affects, des humeurs et des états émotionnels par les sociologues a commencé il y a quatre décennies avec la naissance de la sociologie des émotions. Elle doit continuer à progresser jusqu'à ce que les émotions soient comprises dans la perspective sociologique générale. Cet article présente une revue critique des travaux menés à ce jour par les sociologues des émotions. En premier lieu, ces recherches ont aidé à comprendre la nature des émotions et à découvrir le nombre incalculable de sentiments et la grande complexité des processus émotionnels. En second lieu, ils ont révélé la nature sociale des émotions humaines et la nature émotionnelle des phénomènes sociaux. En troisième lieu, ils ont développé un certain nombre d'approches théoriques pour l'étude des émotions. Finalement, ils ont effectué des analyses sociologiques de nombreuses émotions (peur, confiance, etc.) et des analyses émotionnelles dans de nombreux domaines de la sociologie (genre, travail, organisations, mouvements sociaux). Cet article suggère quelques pistes pour le futur de la sociologie des émotions et une bibliographie choisie et mise à jour.

## Mots-clés

Sociologie des émotions, sentiments, affects, émotions collectives, culture émotionnelle

## Resumen

Las emociones que los seres humanos experimentan juegan un papel fundamental en todos los fenómenos sociales. Como resultado, la sociología necesita incorporar el análisis de estructuras afectivos y emocionales dinámica a sus objetos de estudio. La integración de los sentimientos, afectos, humores y estados emocionales en la investigación sociológica, que comenzó hace cuatro décadas con el nacimiento de la sociología de las emociones, debe seguir avanzando hasta que las

emociones se integren plenamente en la perspectiva sociológica general. Este artículo ofrece una visión general introductoria y crítica del trabajo que los sociólogos las emociones han llevado a cabo hasta el momento. Ellos nos han ayudado, en primer lugar, a entender lo que es una emoción, la infinidad de sentimientos existentes y la gran complejidad de los procesos emocionales. En segundo lugar, han puesto de manifiesto la naturaleza social de las emociones humanas y la naturaleza emocional de los fenómenos sociales. En tercer lugar, han desarrollado una serie de aproximaciones teóricas al estudio de las emociones. Y, por último, han llevado a cabo los análisis sociológicos de muchas emociones específicas (miedo, confianza, vergüenza, etc.) y los análisis emocionales en muchas áreas de la sociología (de género, trabajo, organizaciones, movimientos sociales, etc.). Este artículo también ofrece sugerencias para el futuro desarrollo de la sociología de las emociones, y una bibliografía seleccionada y actualizada.

### **Palabras clave**

Sociología de las emociones, sentimientos, afectos, emociones colectivas, cultura emocional