

# Networks segregation, reference groups and preferences for redistribution

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# Introduction

When discussing preferences towards income redistribution, we must understand how people perceive inequality. Among the factors determining perceptions of economic inequality are those related to social statuses, such as income or educational level, labour market position, authority and control over work, also understood as a social class in sociology. The literature on perceptions of inequality often argues that people's views of inequality are incomplete or biased by the influence of social comparison with their reference groups. Along these lines, the literature defines reference groups in various ways, such as close people or acquaintances and their socioeconomic and demographic characteristics.

An individual who has a more homogeneous and segregated network of contacts would tend to hold views on inequality that are far removed from objective reality because the inferences he or she makes are based on more homogeneous groups, which has a “subjective sampling” effect that contributes to distorted views of low and high-status groups in society. In addition, the literature has shown that the socioeconomic composition of an individual's contacts influences perceptions of inequality. However, there is little evidence of whether this influence is affected by the frequency of ego-alter contact. This research aims to address this question to determine the association of ego's socioeconomic heterogeneity, tie strength and frequency of contact on preferences for economic redistribution. To do so, we use data from the ISSP 2017 Social networks. These data allow us to test our micro-level hypotheses from a cross-national perspective.

Too much perceived inequality, a feeling of inequity in the distribution of resources, can endanger trust and solidarity in a society.” [Joye et al., 2019, p. 44]

# Reference groups, personal networks and subjective inequality

## 2.1 Reference groups and images about inequality

Building on the early work of Kluegel & Smith (1981), the interdisciplinary field known as *subjective inequality* has developed extensive literature on the study of perceptions and preferences regarding economic inequality (Janmaat, 2013; Kluegel et al., 1995). In addition, the theoretical and empirical contributions of sociological distributive justice research on status and justice evaluations (Jasso, 1978; Wegener, 1987) still constitute a growing field of research on the causes and consequences of perceived economic inequality and social status (Castillo et al., 2022). Regardless of the long-standing contributions of the fields of subjective inequality and distributive justice, there is still a gap between this field and the study of redistributive preferences (Condon & Wichowsky, 2020b; García-Sánchez et al., 2019). Recent efforts to reduce the aforementioned knowledge gap suggest that further research on redistributive preferences should go beyond the rational self-interest model and value-driven explanations by studying economic inequality from a subjective point of view, focusing on the influence of reference groups on perceptions and inferences about economic inequality. In consequence, there is still a knowledge gap regarding the micro-foundations, dynamics and causal implications of reference groups on redistributive preferences to be addressed.

For the material self-interest model, the position within the income distribution is crucial for explaining preferences for redistribution. However, two propositions can be discussed. 1) individuals are *aware* of their income relative to others in society, and 2) their inference about the income of others is *accurate*. Therefore, there is no misperception. A fair amount of research on subjective inequality has discussed these assumptions, suggesting that the claimed utilitarian motivation in the self-interest model could be confounded by the influence of reference groups on perception.

The role of reference groups on perception has been previously addressed by social psychology and sociology. Social comparison theory suggests self-evaluation is driven by comparison with reference groups that are conceived as similar (Festinger, 1954). This implies that comparison can be performed across objective or subjective domains, like physical ability or opinions, but also about economic wealth or social prestige. Equity Theory has contributed to the idea of proportionality of outcomes in justice evaluation. In this regard, when an exchange is carried out by individuals of similar characteristics, it is expected that the output corresponds with the initial investment (Adams, 1965). Consequently, justice evaluations will be a function of the input and output equivalence. For instance, disproportionately low results regarding the initial

investment could lead to negative justice evaluations and more prominent experiences of deprivation. Likewise, contributions from the Relative Deprivation Theory (Merton & Rossi, 1968) highlight the perceived status of reference groups in the evaluation process. The assumption of inequality is crucial when evaluating the outcome of an exchange between multiple actors that are perceived as asymmetric. Moreover, the distributive justice literature has suggested that judgments about distributional outcomes are linked with previous perceptions of actual distribution (Wegener, 1990). The explanation suggests that the observer's social status can lead to illusory distributional perceptions that consequently could bias distributional judgments (Wegener, 1987). Hence, even if there is a relative consensus about the relevance of reference groups in social comparison and justice evaluations, there is still little evidence that links their attributes to perceptions and preferences toward income inequality in a more comprehensive way.

Evans et al. (1992) early contributions have proposed two dimensions to analyse the role of reference groups on perceived images of stratification and social status. First, one aspect is to consider income or wealth, educational level, or occupation as the individual socioeconomic basis that constitutes and shapes individual experience with economic inequality. Therefore, they argue that perceptions of economic inequality and status would be partially explained by these material conditions. However, they just tell a piece of the story because objective conditions by themselves are not enough to explain the psychosocial processes involved in the emergence of images about social stratification (Evans et al., 1992). On the other hand, they suggested that socioeconomic status entails a type of social closure generated by the homophily of personal networks, arguing that the socioeconomic composition of reference groups can influence subjective images about stratification and social status (Evans, 2004). These circumstances contribute to what is called a subjective sampling phenomenon, described as a type of availability heuristic that generates inaccurate perceptions. The main argument is that individuals perceive society according to the distribution of income, education, occupations and authority from the people around them (Evans et al., 1992, p. 465). In this line, it has been demonstrated that individuals in both high and low-status groups tend to misperceive the size of those who are above or below them, like a family doctor compared to a medical school professor, or a skilled worker compared to a garbage collector. Therefore, as people tend to prefer to engage in comparisons with similar others, there is a tendency of perceiving themselves in the middle of the social hierarchy due to the overestimation of the size of their reference groups.

In order to inquire about the validity of previous findings in broader contexts, Evans & Kelley (2017) tested to what extent the reference group theory is consistent in cross-national comparisons. They demonstrate that economic development as a macro condition has a micro consequence on perceived economic inequality because it influences the size of potential high-status reference groups (Evans & Kelley, 2017, p. 32). They suggest as long as economic prosperity rises, socioeconomic status in terms of income, education and occupation increases at the individual level, but also the average economic conditions of others around such as relatives, friends or co-workers. However, a limitation of this conclusion is the theoretical assumption of reference groups on perceived structural inequality without systematic evidence in this regard. In turn, they provide exceptional evidence of the influence of the subjective position of (1) friends, co-workers and one's occupation, and (2) family or origin, demonstrating that at least in the United States and Australia, reference groups with higher subjective status do indeed perceive society as more egalitarian (Evans & Kelley, 2017, p. 33)

The literature on subjective social status has contributed with three main remarks. First, the middle-class perceptual bias is a persistent phenomenon across countries, showing that eco-

economic prosperity increases subjective status, while income inequality diminishes it (Lindemann & Saar, 2014). Second, there is a moderate association with structural position measures, such as social class or education (Castillo et al., 2013; Iturra & Mellado, 2018). However, it has been shown that income has a strong positive effect in cross-national (Lindemann & Saar, 2014) and longitudinal studies (Chen & Williams, 2018). Furthermore, it has been demonstrated that personal wealth increases perceived individual social status (Andersson, 2018). Third, the argument of the relevance of reference groups in personal networks and the influence of structural conditions has been named by Kelley & Evans (1995) as the Reference Group and Reality blend (R&R-blend) hypothesis. This approach claims that economic growth, income inequality and the homophily of reference groups jointly shape perceptions about the stratification system. In addition, these images have an anchor effect on how individuals perceived themselves in the social hierarchy. For example, if society is perceived as more egalitarian, people tend to perceive their inner social circle and themselves in higher structural positions, but also if society is seen as more elitarian they will perceive their reference groups and themselves in lower status positions (Evans & Kelley, 2017).

Previous literature has described reference groups as those who are close to the individual, like family and friends, but also refer to acquaintances that are not necessarily persons with whom frequent contact is made. In this line, given that interaction is not only limited to the closest personal networks, it would also be reasonable to consider them as the most significant interactions, but not as the unique source of information about the distribution of socioeconomic resources in society. Taking this point into consideration, the claimed link between income inequality and preferences for redistribution should shed light on (1) how comparisons with reference groups are performed in the social environment, (2) the characteristics of reference groups in personal networks and (3) to what extent their composition affects experiences and perceptions about economic inequality as an explanatory mechanism of redistributive preferences.

## 2.2 Contact, comparison and reference groups

When addressing the influence of reference groups, an important dimension relies on *who* are the observed target groups. The previous argument suggests that inequality perceptions are influenced by social comparison processes, which can be theoretically explained by the R&R-blend hypothesis through the homophilic tendency of social ties formation. However, this approach assumes that comparison focuses on individuals with similar attributes from the closest network without specifying if this mechanism could apply to diverse groups, implying that asymmetric comparison could lead to different outcomes. A recent review suggests that studying the role of reference groups in comparison processes might consider three dimensions: *direction* (e.g., upward, downward), *target* (e.g., friend, stranger), and *dimension* (e.g., status, appearance) (Arigo et al., 2020). For example, it would be possible to expect that contact could lead to experiencing more relative deprivation when the reference group is considered to detain higher status and social prestige (Smith et al., 2020). Furthermore, it has been emphasised that upward comparison, rather than downward experiences, can trigger experiences of relative deprivation and increase perceived economic inequality (Jasso, 1990), which could undermine life satisfaction and subjective well-being (Schneider, 2019). However, one implication of these claims requires identifying the relevance of certain reference groups and their attributes when addressing distributive affairs. An additional inquiry is to examine the hypothetical link between homophilic social ties embedded in personal networks on perceptions and preferences toward economic inequality.

Previous studies have addressed the theoretical claim that certain groups are preferred when personal economic conditions are described and evaluated. For example, Clark & Senik (2010) examined the intensity and direction of income comparisons. A first remark is that the greater importance attributed to income comparison, the higher the chances of declaring work colleagues as the preferred reference group, followed by family and friends. Furthermore, those without a marital partner, highly educated, less affluent and self-employed are less likely to compare. Additionally, almost all employees are more likely to compare with work colleagues than with family and friends. Another study scrutinised the preferred reference groups for economic comparisons of former socialist and European citizens, showing that friends and neighbours are the most prevalent choice in both regions (Gugushvili, 2021, p. 12). Furthermore, those active in the labour market, living in an urban area and with higher subjective status preferred to compare with friends and neighbours. Additionally, individuals with tertiary education and perceived downward mobility tend to prefer the family of origin as the reference group. However, a limitation of this study is that preferred groups are not freely declared, including other groups like domestic elites, the western European region or the country of residence in 1989, excluding other relevant groups such as co-workers in economic comparisons (Clark & Senik, 2010).

Research on the influence of asymmetric reference groups on perceived inequality and preferences for redistribution has gained increasing attention recently. Clark & Senik (2010) found that individuals who prioritize social comparisons and choose family members as their reference group tend to demand higher levels of redistribution. Similarly, Cansunar (2021) reported that high-income individuals tend to support progressive taxation when they perceive themselves as occupying the highest rungs of the social hierarchy but also believe that others earn substantially more than them. Also, García-Castro, García-Sánchez, et al. (2022) showed that frequent interaction with individuals considered “much richer (poorer)” has a positive effect on redistributive preferences when the reference group is deemed poorer, but no effect when it is considered richer. Experimental research has also provided supportive evidence. For example, Brown-Iannuzzi et al. (2015) conducted a study on an online sample of American participants and found that redistributive preferences are likely to increase when individuals make upward social comparisons and perceive themselves to be worse than average in economic terms. Meanwhile, Condon & Wichowsky (2020a) analyzed a representative sample of American adults and discovered that upward social comparison diminishes subjective social status, but has no significant impact on overall redistribution preferences. Instead, it increases demands for specific policies, such as poverty relief and unemployment insurance. Additionally, the upward comparison effect is more pronounced among upper-income individuals, suggesting that they imagine the advantaged others as individuals with outstanding amounts of wealth and power (Condon & Wichowsky, 2020b, p. 80 - 100).

The aforementioned observational and experimental evidence offers valuable insights into the social psychological mechanisms that link reference groups and redistributive preferences. However, an important consideration is how these interactions occur in everyday life, given that social, economic, and institutional factors often segregate individuals and groups (Mijis & Roe, 2021). An assumption in this regard is that nuances in social interactions with reference groups, such as their intensity and direction, provide a framework for inferring how economic resources are distributed in society. Yet, limitations of the reference group approach exist, such as (1) the difficulty of identifying specific groups relevant to an individual, (2) the challenge of describing groups in terms of socioeconomic or demographic characteristics, and (3) the ambiguity of their relevance to the individual. Evans & Kelley (2017) suggested that the

homophilic nature of personal networks could serve as an inferential framework for inequality perceptions in general, and redistributive preferences in particular. Empirical research has partially supported their theoretical claims about the importance of family, friends, neighbours, and coworkers as relevant reference groups (Clark & Senik, 2010; Gugushvili, 2021).

Given that an individual's experience and information about society are often limited by their personal networks composed of family, friends and acquaintances (Mijs, 2018), a first implication is to focus on describing and analysing these attributes as a subsequent analytical step for understanding their consequences on perceptual and attitudinal outcomes. It is worth mentioning that the R&R blend hypothesis relies on the concept of *homophily* of reference groups for developing their argument without directly referring to the longstanding literature on social networks (McPherson et al., 2001). Notwithstanding, recent research has adopted a network analysis approach for studying the influence of network composition and social capital on perceptual and attitudinal outcomes. Since both bodies of literature have little dialogue, analysing redistributive preferences from a social network approach constitutes a comprehensive way of understanding the link between social networks, perceived inequality and economic preferences.



# Structure of association and social networks

## 3.1 Positions, association and tie formation

The study of personal networks requires describing the social structure as the basis for association patterns among individuals. The influential work of Peter Blau (1977b) suggested that examining the nexus between people's positions and social relations implies paying attention to social differentiation, understood as the distribution of social position across the population. These positions are determined by hierarchical status and group membership, representing two forms of differentiation: inequality and heterogeneity. However, the foundations of social structure analysis count on the observable patterns of social association between these positions. The claimed emphasis on social processes of differentiation is rooted in how they shape interpersonal relations in the social structure, often conceptualised as relational networks (Blau, 1977b). Given the distribution and intersection of nominal (groups) and graduated (status) parameters, such as religious diversity or income distribution, the substantive focus is on how society's structural conditions shape social barriers providing opportunities for contact and association (Blau, 1977a, p. 51). The strength of the intersection between parameters reveals the degree of consolidation, for example, the correlation of graduated parameters such as education and income and their intersection with ethnicity as a nominal parameter. Consequently, consolidation influences social integration in order that intervenes in the chances of interaction between persons from diverse groups and statuses (Blau, 1977a, p. 33).

Structural and individual conditions that allow associativity are at the core of social network analysis. One of the most significant findings in the field is homophily, understood as the observed tendency of higher frequency of contact and tie formation between individuals of similar characteristics (McPherson et al., 2001). These associations are structurally differentiated, tending to be segregated by hierarchical status and group membership, such as education, gender, age, religious affiliation (Bargsted et al., 2020), social class (Wright & Cho, 1992) or ethnicity (Plaza et al., 2022). Furthermore, sociopsychological factors affect homophilic association as well, where behaviour and individual preferences tend to reinforce in-group dynamics, isolating individuals from others' worldviews and opinions (Diprete et al., 2011; Visser & Mirabile, 2004). However, it is assumed that the influence of these factors strongly depends on the dynamic provided by structural constraints, such as group size and diversity (Blau, 1977b). Thus, it is expected that both contact opportunities and association preferences contribute to establishing relatively isolated social environments (McPherson & Smith, 2019). Furthermore, this homophilic tendency generates that resources, information and behaviour tend to be segregated, implying that network structure introduces a certain degree of social distance, establishing boundaries among people's social worlds (McPherson et al., 2001).

Associativity depends on people's similarities, but intergroup contact in everyday social activities makes meeting opportunities possible. According to Feld (1981), the *foci* can be a social, psychological or physical entity around which joint activities are organised (e.g. places, persons, families, voluntary organisations). Therefore, when people participate in activities around the same focus, they tend to be interpersonally tied and form a dense cluster group. The focused organisation of social activities is considered more determinant than individual similarities. For example, even if two individuals are similar in their characteristics, the absence of a *foci* and the joint activities around it will decrease their chances of association. This approach is critical of Homan's group balance theory (Homans, 1951), which proposes that attitudinal and value similarities foster association, paying less attention to status or group membership similarities on tie formation around a *foci*. Notwithstanding, the focus theory recognises the relevance of the psychological dimension. Still, it suggests that organised activity spaces constitute a dominant source of ties and represent a significant aspect of people's social environments.

The strength of ties depends on the nature of the association. As focus theory suggests (Feld, 1981), the multiplexity of social positions implies that certain activity spaces matter most in forming social ties (Blau, 1977a). For example, the size of friendship networks tends to decrease through the transition to adulthood, while kinship ties such as the family of origin or partner choices tend to be more stable (Gugushvili, 2021; Volker, 2020). Additionally, considering that intergroup associativity is influenced by the degree of social differentiation, certain social ties that cross boundaries are prompt to dissolution in the absence of spaces that integrate people around a *foci*, such as voluntary organizations, schools or workplaces (Kossinets & Watts, 2009; McPherson et al., 2001). Hence, given that social integration entails the degree of intergroup relations through personal ties of association, network segregation reflects the social distance between groups and the availability of social resources embedded in social networks.

## 3.2 Social networks and resources

Social capital scholars have provided insightful contributions to studying resource inequality through social networks (Lin, 2001). This approach suggests that a person's social environment can be studied through ego-centred networks in which the dyads between a person (*ego*) and their contacts (*alteri*) represent the tie that provides access to resources, arguing that it is possible to characterise the access to valued resources like wealth, status or power through social ties, which provide researchers with an image of how stratified social environments are according to personal and social resources embedded in the ego's social network (Lin & Dumin, 1986). From this perspective, personal resources are those possessed by an individual that can be used and disposed of freely without much concern for compensation. On the other hand, social resources are temporary and borrowed resources that can be accessed through one's direct and indirect ties (Lin, 1999).

According to social capital theory, the mobilisation of resources embedded in social networks is conceptualised in two types of outcomes: instrumental and expressive actions (Lin, 2001). Instrumental actions are described as the expected returns because of access to resources through social ties, such as the influence of acquaintances on the status attainment process (Contreras et al., 2019; Granovetter, 1973). It has been suggested that instrumental actions take the form of three types of possible returns: economic, political, and social (Lin, 2001). It is argued that these three added social capital forms are objects of exchange processes. For example, increasing occupational status can be the key feature of higher authority positions in the workplace,

representing increased control and influence as a political outcome. In addition, these positions can increase social recognition when considered legitimate, boosting trust towards ego within the network (Diprete et al., 2011). Among the possible explanations, three key processes have been described: information, influence and social credentials (Lin, 2001). For instance, certain strategic locations in the labour market (e.g. managers) provide meaningful information about job opportunities that could only exist with the tie. Additionally, authority and power positions imply influence on organisational decisions, like collaboration or member inclusion. Moreover, social credentials are attractive for organisations interested in the contacts held by certain positions, which incentivises organisational consolidation.

Expressive outcomes are described as actions in which the expected return is social capital protection and consolidation to avoid any losses toward preserving current embedded resources and guarantee access to them (van der Gaag et al., 2008). The motivation for mobilisation to preserve pooled social resources comprises the broad network members, integrating ego's and alter's interests. In this line, the theory points out three main expressive returns: physical health, mental health and life satisfaction. Expressive actions aim to maintain the primary material and social resources to ensure protection and support against any threat that might harm physical or mental integrity and maintain optimism and satisfaction among family, work and community spheres (Lin, 2000). Both expressive and instrumental actions are not univocally independent and can reinforce each other. For example, physical and mental health is the basis for sustainable job performance or pursuing organisational leadership responsibilities (Lin, 2001).

Methodologically speaking, among the ego-centred network sampling techniques, the position and name generators represent the most used instrument for measuring positions of social contacts. The position generator is a standard method to assess an individual's access to different types of resources located in social positions (Lin & Erickson, 2008). This technique was first proposed by Lin & Dumin (1986) and employs a sample of structural positions representative of resources highly valued collectively, such as occupations, authority, work units, class, or sector (Lin, 1999). Along with the list of positions, a set of questions can be included to describe the relationship between ego and alter, such as if they are friends, family or acquaintances. The position generator has been demonstrated to be a reliable method for capturing ego-centred networks. Still, a trade-off related to the data quality and the number of positions included should be made, where it has been suggested to include questions of at least 15 to 20 occupations (van der Gaag et al., 2008). On the other hand, the focus on labour market active groups has the disadvantage of excluding retired persons or students from the scope. Additionally, given the extensivity of the instrument, questions about each position are not included for the sake of parsimony, which is translated into a lack of detailed description about each tie. However, the hierarchical status nature of the data obtained provides sufficient information to describe the composition (average resources), heterogeneity (resource diversity) and upper reachability of resources (highest resources accessed) embedded in the ego's network, which entails one of the strengths of the position generator (Lin, 2001).

Another widely used instrument is the name generator/interpreter. It follows the same rationale as the position generator but fulfils some disadvantages, providing detailed information about specific contacts to which respondents feel closest or discussing personal and relevant matters (van der Gaag et al., 2008). After selecting connections, respondents fill in the name interpreter, which includes questions such as age, gender, education, occupation, and ethnicity, among others, and in some cases, the respondent can describe possible connections between their close ties, allowing them to richly describe ego's access to social positions and resources (Lin & Erickson, 2008). However, given that the instrument describes around 3 or 5 closer relationships,

it is well established that these types of connections tend to be influenced by homophily which is translated into less diverse networks. However, rather than providing access to a wide range of positions (hence resources), close ties are related to friendship and kinship, which are more likely to perform a central role in expressive actions (Lin, 2001). An important remark is that both name and position generators can be employed in a complementary way. However, the name generator is more suitable for studying phenomena associated with the ego's close ties, such as patterns of friendship and kinship. In contrast, the position generator provides information about the ego's extended networks that are often more heterogeneous, including more diverse types of relationships and resources that can include acquaintances that provide access to different types of resources (van der Gaag et al., 2008).

### 3.3 Class inequality in social networks

Recent literature has turned attention to the generative processes of social capital formation (Volker, 2020), focusing on access to social capital through structural processes such as intergenerational social mobility and class inequalities. As the social capital theory claims, contact opportunities and association preferences are socioeconomically stratified (Lin & Erickson, 2008). Therefore, it has been demonstrated that access to diverse and higher resources through social ties follows a pattern of capital accumulation that reproduces preexisting inequalities, where class positions have been particularly salient for understanding habits of association that describe exclusion and segregation mechanisms observed through social ties along the class structure.

According to Weber (1978), classes are a common basis for action, defined by the position in the labour market and the access to specific opportunities and goods that come with this standing. In addition, the degree of intergenerational exchange leads to the development of social classes, characterised by particular socialisation patterns and lifestyles that are reproduced over time. The class situation is expressed through sociability practices, marriages, friendships, and social relations between people that belong to a particular status group. Similarly, the formation of classes has been described by Goldthorpe (1992) via two processes. First is demographic identity, where they become identifiable as collectivities by the continuity in which individuals and families retain their class positions across generations. Second is cultural identity, expressed in class members' distinctive shared lifestyles along with their preferred patterns of association. As Bourdieu (1984) suggests in his class *habitus* analysis, cultural capital is the pivotal attribute of these distinctive practices, represented by holding diverse cultural resources among the most salient are educational credentials (Bourdieu, 1984). Hence, this approach suggests that the socialisation of common lifestyles and shared worldviews facilitate the consolidation of classes, which is particularly salient among the upper classes that can choose socially segregated environments that increase their chances of meeting and establishing ties with similar others (Bourdieu & Passeron, 1981). Jointly, these processes further reinforce the social distinctions between classes and contribute to the persistence of class structures.

Studies have shown that *class permeability* in friendship formation is strongly affected by property-based boundaries, in which owners are less likely to be connected to the working class through friendship ties, while routine interactions between supervisors and workers might explain why the authority dimension is highly permeable (Wright & Cho, 1992). Similarly, the upper-middle class held less diverse networks in contrast to the intermediate class regarding their extended networks, while friendship network diversity increases for those who experience

upward mobility (Cepić & Tonković, 2020). However, the gain in higher-status contacts associated with social mobility is moderated by family background, where those upwardly mobile are not able to equalise their social capital compared to the intergenerational stable (Carrascosa, 2023). Moreover, the *u-shape* distribution of ties between the two extremes of the class structure depicts the higher permeability of intermediate classes, where lower class-based homogeneity contrasts with the higher exclusion of the working poor and the self-selected higher status and lower diversity of contacts held by the upper-middle class (Otero et al., 2021). This tendency of accumulation of resources through social ties is intersected by individual characteristics, where the less educated tend to lose contacts in contrast with the highly educated, while men gain in terms of high-status contacts compared to women (Volker, 2020).

# Social networks on perceived and preferred inequality

## 4.1 Social networks and perceived inequality

How people perform inferences about the social world is linked to the degree of segregation in their immediate social environment, which determines the intensity and character of the information that ultimately shapes inequality perception (Mijs & Roe, 2021). Conversations with friends, family and work colleagues shape inequality perception through experience sharing. The socioeconomic diversity of participants in everyday conversations contributes to reconstructing more accurate images regarding income and wealth inequality than isolated individuals (Summers et al., 2022). Persistent economic inequality led to spatially segregated interactions and isolated lifeworlds that provide meaning to social inequality experiences, resulting in doubts about worthiness when the lower classes contrast themselves with extravagant lifestyles from the upper classes, undermining feelings of social inclusion and cohesion (Sachweh, 2012). Similarly, attachment to society weakens when diversity is undermined by class-homogenous networks, which represents the lack of knowledge about others' lifestyles and experiences (Otero, Volker, Rözer, et al., 2022). These ideas resonate with the concept of 'empathy-gulf', understood as the social distance among groups widened by extreme inequality, increasing the barriers to imagining other's lifestyles and goods, which might diminish feelings of injustice and redistributive demands (Sachweh, 2012, p. 19). Therefore, the life of others become more distant and might have consequences on empathy and solidarity toward others, potentially leading to perceiving fellow citizens as strangers (Otero, Volker, Rözer, et al., 2022, p. 758).

The literature has argued that low redistributive preferences in unequal contexts might be explained because people misperceive inequality due to their lack of information about the distribution of resources in society (Alesina et al., 2018; Cruces et al., 2013). However, this argument has been criticised in two aspects. First, survey questions can cognitively challenge respondents when addressing quantiles or distributions. Also, numeric representations like wage inequality compared to visual representations can lead to substantial differences regarding the size of the claimed misperception (Hadavand, 2018, p. 249). Second, even when experimental studies have shown that providing accurate information can manipulate perceptions that align preferences with self-interest (Hvidberg et al., 2020; Stantcheva, 2021), the question regarding how this mechanism might operate outside of controlled experiments has yet to be clarified. Echoing Kelley & Evans (1995) original claims about the influence of reference groups on perceived images about stratification, recent research has focused on social networks as a manner of de-



scribing social environments and assess their consequences on perceived and preferred economic inequality.

- Inequality in researchers' minds: Four guiding questions for studying subjective perceptions of economic inequality <https://onlinelibrary.wiley.com/doi/10.1111/joes.12507>

Given previous evidence, reference groups play a role in shaping perceptions about the social hierarchy.

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Friendship network composition and subjective well-being <https://academic.oup.com/oep/article-abstract/72/1/191/5359496?redirectedFrom=fulltext&login=false>

Mayor diversidad étnica y religiosa en amistades impacta negativamente el bienestar subjetivo. «Se puede predecir que esto afecta positivamente las preferencias hacia la redistribución, donde menos bienestar implica mayor demanda por bienestar»

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Joye et al. (2019) - Measuring social networks and social resources: an exploratory ISSP survey around the world

- The lives of others: Class divisions, network segregation, and attachment to society in Chile

## 4.2 Social networks and preferences

- demanding redistribution can be considered an instrumental action?

“because managers are expected to be more negative towards economic redistribution than the average individual, we also expect that having more social ties to managers is associated with below-average support for redistribution.” [Lindh et al., 2021, p. 699]

“As noted above, people tend to befriend similar others and this also applies to political orientations” [Lindh et al., 2021, p. 699]

“probable co-evolution of network formation and political attitudes limits the possibility of interpreting cross-sectional associations between network ties and attitudes as exogenous causal effects” [Lindh et al., 2021, p. 699]

- qualitative evidence has shown that higher classes detent stronger meritocratic and lower inequality perceptions what lead them to justify current economic inequality
- “increase self-interest among the upper classes by means of processes of social influence, thereby reducing their sense of responsibility for the plight of invisible others (e.g., Lindh et al., 2021).”

Percepción de desigualdad “diff income are too large”: <https://journals.sagepub.com/doi/full/10.1177/07311214211062106> - personas de clase servicios perciben menos desigualdad que los de clase trabajadora y media (países de europa)

- “In Chile, income differences are too large.” This measure was conceptualized as tolerance of inequality (Gonthier, 2017; Larsen, 2016; Schröder, 2017). Considering higher scores of this measure have been shown to mean lower tolerance for inequality, we designate said measure as intolerance of inequality.” (García-Castro, González, et al., 2022, p. 5)

## 4.3 Comparative evidence and contextual influences

Son, Joonmo. 2013. Social Capital and Institutional Constraints: A Comparative Analysis of China, Taiwan and the US. London: Routledge.

Salience of reference groups mainly improved by GDP as a proxy of social modernization.

Inequality increases concerns about social status. For example, individuals are more likely to compare their income to that of their neighbours’ when inequality increases.

The self-interest model predicts a positive link between income inequality and the levels of redistribution.

It is based on the subjective median-voter hypothesis (Buchel et al., 2021). The general assumption is that subjective status, compared to income, has a stronger negative impact on redistributive preferences (H1). As has been shown, economic inequality has a negative association with



subjective social status (via increasing upward comparison). Therefore, the negative influence of subjective social status will be positively moderated by income inequality.

“Higher economic development increases the chances of having high-status reference groups through educational and occupational upgrading. “the pools of potential reference group members in the upper strata expand with development.” (Evans & Kelley, 2017, p. 32)

H<sub>i</sub>: GDP increase the average SES of the reference groups H<sub>i</sub>: Economic inequality (Gini) increases the segregation of reference groups H<sub>i</sub>: What is the relation of inequality and personal network segregation? in theory it should be positive.

Cheung, F. and Lucas, R. E. (2016) ‘Income inequality is associated with stronger social comparison effects: The effect of relative income on life satisfaction’, *Journal of Personality and Social Psychology* 110(2): 332–341. doi:10.1037/pspp0000059.

### **Spatial Segregation**

“Erickson (1998) differentiated two types of social capital: global and local. Local settings refer to geographic areas (neighborhoods), ethnic areas (ethnic communities and enclave economies), or organizations (schools, voluntary organizations, social movements, or firms).” (Lin, 1999, p. 480) (pdf)

“exogenous factors such as community and institutional arrangements and prescriptive versus competitive incentives may differentially contribute to the density and openness of networks and relations and the success of instrumental or expressive actions .” [Lin, 2001, p. 41] contextual factors

Otero, Volker, & Rozer (2022)

# Research plan

## Overview

Considering the theoretical and empirical elements presented above, I would like to contribute to the redistributive preference literature and discuss the role of social comparison as a relevant explanatory mechanism. As a result, my main research question is *What is the role of social comparison on redistributive preferences formation?*. In this respect, the first part of my research is to assess the relevance of subjective social status on redistributive preferences from a comparative perspective, considering that individuals' perception of their position in society can be understood as an outcome that derives from the social comparison that is also affected by a contextual characteristic such as objective income inequality at the country level. The second part of my research will address the role of social comparison experiences on policy preferences in cross-country comparison and employ national representative panel data. It is argued that levels of segregation at the country and community levels influence the frequency and salience of social comparison. As a result, contact with high-status groups will increment relative deprivation and demand for redistribution. The third part of my research will incorporate elements from the distributive justice literature to provide a complete image of the role of reference groups in social comparison and how these factors are associated with redistributive preferences. In this regard, evaluations are affected by observer's and observed characteristics, allowing us to estimate how these factors impact an outcome. Therefore, I propose a factorial design to assess the role vignette's attribute on the observer evaluation of the hypothetical individuals being affected by specific policies (e.g. increase taxes, health or unemployment benefits)

## 5.1 Paper 1

**Title:** Reference groups, perceived inequality and preferences for redistribution and welfare

**Hypothesis for reference groups:**

Homophily

- isei\_network (-) perc\_ineq / deprivation
- diversity\_network (-) perc\_ineq / deprivation
- isei\_network (-)
- diversity\_network (+) / basado en paper Londoño

Hypothesis of inequality experiences: - perc\_ineq (+) / deprivation (+)

Hypothesis for networks and perceived inequality - isei\_network x perc\_ineq (+) - diversity\_network x perc\_ineq (+)

“en la medida que aumenta las experiencias negativas sobre la desigualdad el efecto positivo de la composición de la red debería fortalecerse”

“en la medida que aumenta las experiencias negativas sobre la desigualdad el efecto positivo de la diversidad de la red debería fortalecerse”

Medición de estado/mercado Public Opinion against Markets? Attitudes towards Market Distribution of Social Services – A Comparison of 17 Countries: <https://onlinelibrary.wiley.com/doi/10.1111/spol.12105>

In study 1, I will address the claimed link between income inequality, social comparison and subjective social status

Individual level hypothesis:

$H_1$ : Higher perceived economic distance from the high-income reference group is associated with lower subjective status

Contextual level hypothesis:

$H_2$ : Income inequality is associated with lower subjective social status

Cross-level hypothesis

$H_3$ : Income inequality strengthens the association of social comparison on subjective social status

In study 2, I will address the link between income inequality, subjective social status and redistributive preferences

Individual level hypothesis:

$H_1$ : Higher subjective social status is associated with lower redistributive preferences. This association will be stronger compared to income.

$H_2$ : The negative association of income will be stronger among low subjective status individuals.

Contextual level hypothesis:

$H_3$ : Income inequality increases redistributive preferences. Between-country will be more important than within-country effect.

Cross-level hypothesis:

$H_4$ : The association of subjective social status with redistributive preferences will be stronger in contexts of higher income inequality

$H_5$ : Among higher subjective and objective status individuals the support for redistribution will be higher for those in context with higher income inequality (objective and subjective altruism)

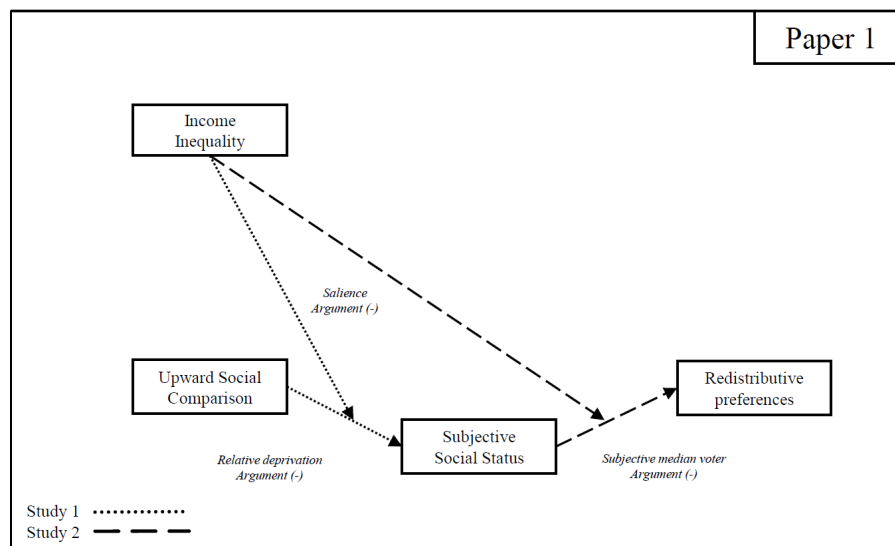


Figure 5.1: Theoretical model for paper 1

### 5.1.1 Data, variables and methods

#### Data

- ISSP Social networks 2017:

**Variables** - Homophily of reference groups (EI homophily index) - SES of alters (avg isei) - Experiences economic inequality - Subjective status - Redistributive (avg index) and Welfare (avg index)

## **Methods**

- Multilevel Linear Models

Comparison of social capital indicators from position generators and name generators in predicting activity selection <https://www.sciencedirect.com/science/article/pii/S0965856417312454#f0015>

Chapter 10: The position generator approach to social capital research: measurements and results <https://www.elgaronline.com/display/edcoll/9780857935847/9780857935847.00014.xml>

## **5.2 Paper 2**

Pending.

## **5.3 Paper 3**

Pending.

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