

Social comparison and preferences for redistribution

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2023-01-31

Contents

1	Preferences and Economic Redistribution	3
1.1	Preference formation	3
1.2	Redistribution: what, how and who	5
2	Objective position and material factors	7
2.1	Income, wealth and future income	7
2.2	Social mobility	8
2.3	Risk and externalities	9
3	Normative factors	12
3.1	Norms and values	12
4	Subjective factors	14
4.1	Subjective social status	14
4.2	Social comparison and redistributive preferences	15
5	Contextual factors	18
5.1	Economic inequality	18
5.2	Social distance and Spatial Segregation	18
6	Research plan	19
	Overview	19
6.1	Paper 1	20
6.2	Paper 2	21
6.3	Paper 3	21
	References	22

Preferences and Economic Redistribution

1.1 Preference formation

During the past decade, the research field of individual preferences toward economic redistribution constitute an interdisciplinary field in the social sciences (Alesina & Giuliano, 2010; Steele & Breznau, 2019). In this regard, as a result of disciplinary boundaries, the phenomenon has been addressed through a range of concepts, such as *attitudes* toward redistribution (García-Sánchez et al., 2019), *social or welfare policy* preferences (Breznau, 2010; Rehm, 2016) and *preferences, support or demand* for redistribution (M. Evans & Kelley, 2018; Jaime-Castillo & Marqués-Perales, 2019; Steele et al., 2022). Across this body of literature, the common denominator is that individuals in society hold different views about what should be the role of government in taking measures for providing welfare and to what extent this role has to be accomplished. In order to establish boundaries and properly conceptualize this phenomenon, we need to review previous discussions in the literature.

The theoretical framework proposed by Janmaat (2013) distinguishes between the concepts of perceptions, beliefs and judgments about economic inequality. First, perceptions refer to subjective descriptive estimations, in other words, how individuals think existing inequality is. Second, beliefs are understood as the normative dimension regarding how income distribution should be, acquired through socialisation processes. Finally, judgments are considered as the normative evaluation of the existing inequality, referring to what extent it is considered good or desired (Janmaat, 2013, p. 4). Within this framework, the concept of preference is occasionally misled with beliefs or judgments. In this regard, is relevant to point out that the ideas about how the object (e.g. inequality) should be, do not explicitly consider its' evaluation. In this line, the concept of preference needs to be distinguished from the previous framework, because the phenomenon studied in the redistributive preferences literature refers to the subjective appraisal regarding measures (e.g. social policies) to afront the existing levels of inequality.

Another approach for the study preferences has been developed by Druckman & Lupia (2000). On their view, the formation of preferences can be understood as the combination of internal and external dynamics, suggesting that preferences derive from the evaluation of an external object and its' attributes relative to another (e.g. public policy). Objects can be observable physically continuous phenomena (e.g. furniture) and unobservable, physically discontinuous phenomena (e.g. shared ideas) (Druckman & Lupia, 2000, p. 4). In addition, individuals evaluate based on beliefs that are linked to the description of an object's attributes, which are in turn built on top of previous information acquired by the exposure to the stimuli of the environment, in other words, by experience (Druckman & Lupia, 2000, p. 5).

Both approaches mentioned constitute an insightful understanding of what preferences are and how they are formed. Nevertheless, there is a difference that needs to be clarified. On the one hand, Janmaat's (2013) approach allows distinguishing the descriptive from the normative dimension in the study of subjective inequality but is less clear toward the concept of preferences. In this regard, I argue that preference formation does have a normative dimension, but it is not purely based on it. Therefore it is necessary to consider external influences. On the other hand, Druckman & Lupia (2000) do not explicitly consider preferences to be linked with norms. They suggest that preferences are the function of beliefs, and the latter are systematically formed through experience. In this regard, preferences are the manifestation of an object evaluation, which is ranked by an observer on top of the description of its attributes. In my view, both approaches share the assumption about preference formation is not entirely neither internal nor external to the individual. In other words, both approaches agree that the descriptive dimension comprises the foundations for further evaluations which consequently lead to the formation of preferences.

The crucial point in which both approaches differ is how they define *beliefs*. For Janmaat (2013) beliefs are less contingent, in order that they are linked to social norms, but for Druckman & Lupia (2000) due to beliefs being a function of perception, they are more dynamic and susceptible to being updated by external shocks (e.g. information) (Druckman & Lupia, 2000, p. 6). In this regard, I argue that adopting *beliefs* as a concept can be problematic, due to the different meanings that the literature has used for the study of preferences. These differences could lead to conceptual inconsistencies, wrong assumptions about causality and erroneous theoretical conclusions.

As an alternative to the unclear use of beliefs, the literature has developed the concept of *values* as a more accurate representation of the normative dimension (Feldman & Steenbergen, 2001). From this perspective, the internalisation of social norms is tightly linked with socialisation processes and represents a less contingent and stable characteristic (Min et al., 2012). Social norms represent the pursued societal rules and goals, which are rationalised as individual motivation for action (Brezna, 2010). Values can be expressed by particular views, for example, about the distribution of economic opportunities and resources or to what extent humans share certain universal attributes that make them deserve to be recipients of welfare (for details see section 3.1).

Summary

For studying preferences, it is crucial to have a clear conceptual framework to address. The proposed framework is composed of four core elements: Information, Perception, Values and Judgment. Figure 1.1 depicts the conceptual distinction between these elements, but also an attempt to synthesise the approaches reviewed above. Following Druckman & Lupia (2000), *Information* constitutes the external *stimuli* which contribute to the reference framework employed by individuals to describe the attributes of an object, which is in turn understood as *Perception* (how *is*). In this regard, an assumption is that perceptions can change and it relies on the possibility of partially updating current information. Aside from the environmental exposure and the descriptive dimension, there are internal normative structures that are expressed by *Values*. In this line, I argue that contingent *Information* does not play an important role in values because ideas that have been acquired in socialisation processes do not experience relevant changes and tend to be more consistent on time. The fourth element synthesises the influence of the previous. However, it goes a step forward considering *Judgment* as the evaluative process that emerges on top of the description and the normative views around the attributes of an object that lead to consider it as desirable (or not), remaining latent until it can become observable as

a revealed *Preference* under a certain situation which demands a manifestation of it.

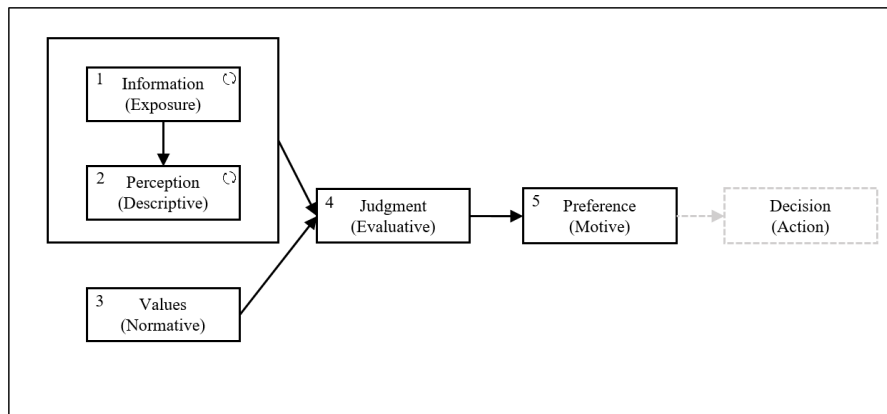


Figure 1.1: Conceptual framework for preference formation.
Note: the update symbol (1 and 2) represents the attribute of change.

1.2 Redistribution: what, how and who

How the redistributive preferences literature has addressed the phenomena, apart from the previous distinction in preference formation, it is important to point out how preferences have been conceptualised across the literature. Previously, we have mentioned that disciplinary boundaries influenced the denomination of the phenomena. Despite this, this section presents three of the main conceptual approaches that have been empirically discussed across the literature.

Preferences can be approached according to how concrete the attributes of the evaluated object are. One way to empirically address preferences for redistribution is the reduction of economic inequality which refers to what extent individuals believe that the government should be responsible for the reduction of the income gap between rich and poor, which has become one of the most common approaches for the study of preferences in the literature. For example, based on the General Social Survey Alesina & Giuliano (2010) analyse the evaluation of citizens about the role of government in Washington in improving the standard of living of all poor or if they should take care of themselves. From a cross-national approach, using data from the World Value Survey the Alesina & Giuliano (2010) analysed to what degree citizens believe that welfare should be the responsibility of individuals or that the government should provide universal support. On the same line, García-Sánchez et al. (2019) scrutinise to what extent individuals agree that the government is responsible for reducing the differences between high and low incomes by employing the International Social Survey Programme. Looking at regional comparisons, Jaime-Castillo & Marqués-Perales (2019) examined European citizens' opinions on the idea that government should take measures to reduce income differences by employing the European Social Survey. Finally, Franetovic & Castillo (2022) compared Latin American countries using the Latinobarometer survey, analysing to what extent subjects agree that government should implement policies to reduce income inequality between rich and poor. Overall, these cases briefly describe how the literature has empirically addressed general preferences for redistribution without addressing specific welfare policies.

Another dimension of redistributive preferences is how individuals rationalize the link between tax policy and economic inequality. In this regard, there is research that has employed the

concept of preferences for progressive taxation as a way to study redistributive preferences. The argument is that the link between income and welfare is increasingly relevant in societies with a progressive tax regime in which households on the top of the income distribution are those who contribute more and get directly benefited less by redistribution in which the core assumption that links income and redistributive preferences relies on what extent individuals prefer a progressive tax policy ([Cansunar, 2021, p. 1](#)). However, empirical findings have shown that even the more affluent are more willing to support progressive taxation when they perceive that someone is richer than them ([Cansunar, 2021](#)). In addition, other evidence has shown that even against their material interest, low-income individuals support regressive tax cuts as a result of their perceived own tax burden, but also due to a lack of political information ([Bartels, 2005](#)).

Finally, another body of literature has addressed preferences for redistribution based on the evaluation of certain social policies (e.g. unemployment benefits or health insurance). In this line, the individuals or groups that potentially become recipients of these welfare policies can be conceptually distinguished between those who are directly affected by policies in the short term (e.g. the poor or unemployed) ([Aarøe & Petersen, 2014](#)) and those who are going to be affected by them, potentially or directly, in the future (e.g. ill or retired) ([Castillo et al., 2019](#); [Rehm, 2016](#)). In this regard, how the government enacts welfare policies also considers the characteristics of the recipients of the benefits. This subject has been addressed by the deservingness heuristic approach, which adverts to what extent a certain group or individuals are considered to be within the scope of benefits of a certain welfare policy ([Jensen & Petersen, 2017](#)). Therefore, it has been argued that public preferences toward redistributive social policies represent the evaluation of the policy, taking into account to what extent it affects the present (or future) material interest of the evaluator (e.g. income tax rise), but also the attributes of the recipients of the enacted policy ([García-Sánchez et al., 2022](#)).

Summary

Overall, two main dimensions of redistributive preferences have been addressed empirically in the literature. However, this exercise has its problems, as there is a clear distinction between an *abstract* willingness to increase redistribution and a *concrete* preference for specific redistributive measures. Regarding redistribution in the abstract, the idea that some entity (e.g. the government) should be responsible for reducing economic inequalities represents an abstract understanding of redistribution because it does not specify how this should be done, under what conditions, or who the beneficiaries are ([García-Sánchez et al., 2022, p. 3](#)). This approach can be problematic because it can be argued that it captures a general preference for economic inequality, that may not be consistently linked with concrete policies ([Steele et al., 2022, p. 8](#)). Nevertheless, the limitations of this approach do not imply that is not possible to adopt it but is crucial to clarify that it represents no more than general preferences toward redistribution.

On the side of redistribution in concrete, there are at least two domains. One is the goals and scope of the tax regime, and the other is the provision of social welfare. In this line, McCall & Kenworthy (2009) suggest that redistribution in practices can be addressed by rising taxes for those with higher incomes and by increasing public transfers for those in need. However, they consider that demands for governmental action are not necessarily linked to redistributive preferences, but public spending on welfare policies. Given this evidence, it might be correct to treat them as independent public opinion phenomena. However, a less discussed aspect in the literature is to what extent individuals link taxation with the provision of public welfare, but also the factors that could intervene in this association.

Objective position and material factors

The literature has pointed out the objective position as one of the main drivers of preferences for redistribution. As an extension of the median voter theorem, the Meltzer & Richard model (Meltzer & Richard, 1981) proposed economic self-interest as an explanatory mechanism for redistributive preferences. The model proposes income as the representation of voters' material interests expressed by their preferences as the function of the distance from the income median, where those below it hold higher preferences for redistribution compared with those above. In other words, those at the bottom benefit more from redistribution and are less affected by tax burden increases compared to those close to the top of the income distribution.

2.1 Income, wealth and future income

The negative influence of economic self-interest on redistributive preferences has been widely documented in the literature. Evidence from the United States (Alesina & Giuliano, 2010), Europe (Dimick et al., 2018) and Latin America (Franetovic & Castillo, 2022) has supported the predictions of the theory. However, despite evidence favouring the self-interest hypothesis, recent studies have shown mixed evidence regarding the adverse preferences of high-income groups and the role of market income as the primary driver of self-interest. For example, a recent study on urban Brazilian citizens found a positive influence of income on redistributive preferences (García-Sánchez & De Carvalho Galvão, 2022). The authors suggest higher awareness regarding income inequality among affluent and educated individuals in an unequal context like Brazil, which makes them express altruistic views about inequality and support higher redistribution. Furthermore, although cross-national comparisons have shown the expected negative association, there are also null and positive effects of income among different redistributive domains, demonstrating that adverse preferences among the rich are inconsistent across societies (Steele et al., 2022, pp. 10–13). In this regard, the authors point out wealth as an alternative and more stable source of self-interest than market income.

The role of wealth has yet to be discussed in the redistributive preferences literature. Steele (2020) argued that wealth could constitute a more comprehensive aspect of studying economic resources. At the same time, it encompasses the totality of assets, which can be subdivided into “housing wealth”, representing ownership of a dwelling and other types of property such as land or vehicles. In addition, there are financial assets, such as savings accounts or shares in the financial market, that can be understood as “financial wealth” (Steele, 2020, p. 2). Using cross-national data from the International Social Survey (ISSP onwards), Steele (2020) found higher relative importance of financial wealth than housing wealth. The author argues in favour

of disaggregating both sources of wealth suggesting financial assets are often easily translated to liquid rather than housing wealth commonly linked to mortgages and does not provide a direct income source. Thus, in contrast with market income, housing and financial wealth have an independent positive but heterogeneous influence on country redistributive preferences. Similarly, Steele et al. (2022) took a deeper look into the influence of both wealth dimensions demonstrating that financial wealth has a stronger association among Nordic societies, arguing that income inequality in these countries is one of the lowest in the globe. Therefore wealth inequality could be more salient than income when individuals express their preferences. Furthermore, it is argued that wealth is related to a “safety net” effect. In other words, it provides economic security in the form of inheritance for the next generation, protects them from economic shocks (e.g. unemployment), and enhances life chances (Steele et al., 2022, p. 4).

Rueda & Stegmueller (2019) have argued that most material self-interest literature focused on market income, but the relative importance of income prospects has yet to be explored appropriately. In other words, the analysis of the self-interest mechanism should not be limited to a measure of current income but also pay attention to life course events and their potential consequences on *future* material conditions. Their argument relies on the Mincer earnings function, where income returns are a function of human capital and experience in the labour market (Rueda & Stegmueller, 2019, p. 42). However, the proposed influence of future income relies on the assumption that individuals *know* about the life cycle of people from their same educational group. Thus, knowledge about income prospects can negatively influence actual preferences for redistribution. First, they demonstrate that actual and expected income were not highly correlated, in favour of their expectation about the independency of the effect of both on redistributive preferences. Second, their analysis using European cross-sectional and panel survey data confirm that the robust effect of future income undermines preferences for redistribution.

The contributions on the role of wealth and future income point out the importance of time-varying individual characteristics but also turn our attention to long-term changes like intergenerational transmission of advantages and social mobility. In this vein, there is an important body of literature on the role of social mobility (actual or expected) on preferences for redistribution. In the following section, I will revise recent evidence in this respect.

2.2 Social mobility

How social mobility influences preferences for redistribution has been influenced by disciplinary boundaries in the social sciences. For example, sociologists have focused on intergenerational social mobility employing occupational class schemes to analyse individual changes in labour market positions compared with the previous generation (Connelly et al., 2016; Erikson & Goldthorpe, 1992), while economics has paid more attention to income mobility (Alesina et al., 2018). Research on the subjective dimension of social mobility has also been developed during the last years, focusing on the influence of perceived economic situation compared to previous generations (Mijs et al., 2022). The redistributive preferences literature has conceived social mobility as a factor able to boost self-interest via two situational mechanisms. On the one side, experienced intergenerational upward (downward) mobility is associated with lower (higher) demand for redistributive measures. On the other side, it is expected that prospects of upward mobility in the future, or for future generations, undermine redistributive preferences.

Evidence from the United States has shown that intergenerational occupational upward mobility increases redistributive preferences, compared with the null effect of educational mobility (Alesina & Giuliano, 2010). Similarly, evidence from European countries using diagonal reference models for social class mobility has shown lower preferences for redistribution for upward-mobile individuals (Jaime-Castillo & Marqués-Perales, 2019). In the same vein, a study of Latin American countries demonstrates that upward educational mobility has a robust positive influence on preferences redistribution and privatisation of public services (Gavira, 2008). Overall, cross-national and single-case studies have shown evidence of the unique explanatory capacity of having experienced upward social mobility through education and occupational class. However, it has been illustrated by the literature on subjective inequality that perception plays a crucial role in how individuals rationalise their origin and destination positions.

Studies have demonstrated that higher subjective social mobility increases the willingness to justify the system (Day & Fiske, 2017) and boosts acceptance of economic inequality (Fehr et al., 2020). A cross-national study found evidence in favour of the positive link of occupational and educational mobility on perceived social mobility but also demonstrated that perceived mobility weakens the effect of objective mobility on higher wage inequality justification (S. M. C. Kelley & Kelley, 2008). A recent study in five western societies has shown that Europeans are more pessimistic about social mobility than Americans. Still, also their experimental results demonstrate that manipulation of perceived income mobility with pessimistic information increases support for redistribution, mainly through equality of opportunities policies (Alesina et al., 2018).

Current or perceived levels of social mobility in society can influence the expectations about mobility prospects. In this regard, Benabou & Ok (2001) have formalised the prospective upward mobility hypothesis (POUM) as an extension of the median voter model, where even those below the income median can develop adverse preferences toward redistribution, assuming that progressive taxes can negatively affect them due to their expectations of achieve incomes above the median. Empirical evidence has demonstrated that expectations about upward social mobility are associated with lower support for redistribution. For instance, using a sample of Italian students, the experimental manipulation of mobility prospects increases the demand for redistribution, being more salient among middle and lower-income individuals (Filippin & Antonio, 2003). Another study in Spain demonstrates that redistributive preferences decline among individuals with subjective income expectations above the median and higher perceived meritocracy (Jaime-Castillo, 2008). On another approach, among Latin American countries, higher expectations about the next generation's educational achievement diminish support for redistribution (Gavira, 2008). Using expected subjective well-being as a proxy of future economic security, Fong (2006) demonstrates that well-being prospects decrease support for redistribution but also discusses the negative influence of internal poverty attribution (e.g. laziness).

2.3 Risk and externalities

Present or current individual situations do not entirely guide redistributive preferences. Therefore, expectations about potential adverse outcomes in the future can influence support for redistribution, which the literature has addressed through the concept of risk exposure. The concept is commonly defined as the chances of experiencing shocks across the life course that can undermine economic security and welfare (Rehm, 2016). Welfare state literature on the field has linked risk in two veins. One part of the literature has pointed out labour market outcomes fo-

cusing on individual unemployment risk (Rehm, 2009). Another body of literature has focused on deservingness heuristics, pointing out that the risk of being affected by random events, such as sickness-based needs, could motivate higher demands for health or unemployment welfare (Jensen & Naumann, 2016).

The literature has demonstrated that unemployment increases demand for redistribution and social insurance (Alesina & Giuliano, 2010; Steele, 2020). In this line, the argument for studying risk from a labour market approach relies on potential outcomes, not current employment status, where the odds of losing the current market income can raise the demand for redistributive policies. Another dimension of the link of unemployment risk is to what extent national redistribution can compensate for the adverse employment impacts of globalisation on particular economic sectors, arguing that a more significant influence of international trade is associated with higher demand for redistribution (Rehm, 2009, p. 6). However, empirical evidence has shown only an increment in redistributive claims for higher occupational risk at the individual level but null evidence in favour of the compensation effect by the economic sector (Rehm, 2009). Similarly, Svallfors (2006) has argued that labour market position provides information about work conditions and wages. Thus, it has been shown that lower incomes and, consequently, higher labour market risk among the lower classes are associated with higher demand for redistribution (Svallfors, 2006). Furthermore, a recent study has claimed automation as another source of risk, demonstrating higher levels of support for redistribution among lower-skilled workers with higher automation rates (Hoorn, 2022).

Social insurance demand through health-related policies has also been linked with risk exposure. The argument is that random shocks across the life course can increase the demand for redistribution (Alesina & Giuliano, 2010, p. 18). However, the support for specific policies is influenced by their content and affected target groups (Moene & Wallerstein, 2001). For instance, a cross-national study has shown that higher incomes increase the demand for governmental responsibility on health welfare, also a higher willingness to pay taxes for improving the health care system, but a null association with higher social spending for preventive medical check-ups (Azar et al., 2018). Also, another research demonstrates that a higher unemployment risk increases the willingness to pay taxes for universal healthcare in 28 countries (Maldonado et al., 2019). In addition, it has been demonstrated welfare system can influence the link between unemployment risk and health policy preferences, where high levels of health system privatisation lead to less demand for healthcare spending to be negatively influenced by unemployment risk (Zhu & Lipsmeyer, 2015).

The influence of income inequality on demand for insurance is not entirely related to labour market outcomes. The literature has discussed how concerns about the negative consequences of inequality can trigger insurance motivation. In this regard, altruism has been proposed as an explanatory mechanism that links inequality with redistributive preferences of the top income groups (Dimick et al., 2018). It has been argued that negative externalities of income inequality on social welfare can motivate normative-driven altruistic preferences from affluent individuals (Dimick et al., 2018). Altruism relies on both individual and social utility of social welfare as desirable, assuming concerns about inequality as the normative foundation of altruistic preferences by the rich. Evidence from European societies has confirmed the theory's claims, demonstrating an increase in redistributive preferences among the rich in highly unequal contexts, in contrast with the rich in lower inequality contexts (Dimick et al., 2018; Rueda & Stegmueller, 2019). A recent study has also found evidence in favour of the theory in Latin American countries (Franetovic & Castillo, 2022, p. 15). On the same line, derived from the altruistic model, it has been argued that crime as a negative externality can increase insurance demands (Rueda

[& Stegmueller, 2019, p. 86](#)). In this regard, more significant concerns about crime can motivate altruistic behaviour from the rich for high public spending to mitigate crime rates as negative externalities. In this regard, it has been demonstrated that higher fear of crime or being a victim of crime in the past increases redistributive preferences ([Rueda & Stegmueller, 2019, p. 113](#)). Then, the evidence shows that higher preferences among the rich can be explained through concerns about crime in highly unequal contexts ([Rueda & Stegmueller, 2019, p. 128](#))

Normative factors

3.1 Norms and values

Social norms constitute a crucial factor for studying social order and behaviour (Esser & Kroneberg, 2015), but also provide an interpretative frame for understanding social welfare institutions (Esping-Andersen, 1990). The literature on redistributive preferences has addressed this domain as an independent source of motivation for individual preferences as an alternative approach to the material self-interest explanations. Inspired by the sociological theory of action, Esser & Kroneberg (2015) suggest that the *homo economicus* or utilitarian paradigm focuses on opportunities, incentives, and rational expectations as an explanation of human behaviour following the self-interest mechanism. On the other hand, from the *homo sociologicus* or normative paradigm, institutionalised rules of action are learned through socialisation and internalisation processes. Therefore, human behaviour will unconditionally be influenced by normative appraisals. A third approach is the interpretative paradigm, which seeks to synthesise rational and normative approaches to develop a situational-dependent model of action based on frame selection (Esser & Kroneberg, 2015, pp. 69–80). Frames are ideal-typical situations based on previous experiences that can provide meaning to the evaluated situation, which can activate two possible modes: automatic-spontaneous (as) or reflecting-calculating (rc). The as-mode is strongly influenced by previous experience, and choice selection tends to be less reflexive. In contrast, the rc-mode considers several alternatives where uncertainty and future consequences activate moral evaluations. Thus, a framework where actions are guided by weighting utilitarian and normative evaluations can serve as an explanatory frame for variations in redistributive preferences.

The literature on preference for redistribution has addressed the influence of normative factors under the concept of *values*, but some research has used *beliefs* or *ideology* interchangeably. However, political psychology and political science literature have suggested that values differ conceptual and empirically from the left-right continuum commonly used to study political ideology, arguing that egalitarian values can be shared by people on different political spectrum points (Feldman & Johnston, 2014). The literature on social welfare preferences has discussed the role of egalitarian or humanitarian values as sources of normative motivations for redistribution. Feldman & Steenbergen (2001) have argued that egalitarianism is related to the justice principle of equality and associated with higher support for government intervention in social and economic spheres. At the same time, humanitarianism is considered a prosocial orientation close to the justice principle of need and is commonly associated with poverty relief or health policies (Feldman & Steenbergen, 2001, p. 5).

Egalitarian values are expected to be associated with higher support for redistribution. For ex-

ample, distributive justice literature has shown that lower justification of economic inequality is associated with stronger egalitarianism ([Castillo, 2011, 2012](#)). Furthermore, a study of six western industrialised societies demonstrated that higher attachment to egalitarian values is strongly associated with support for government involvement in social services, price controls and basic needs subsidies ([Brezna, 2010](#)). In a similar vein, a study on European countries shows that egalitarianism increases demand for progressive taxation and government social spending ([Svallfors, 2013](#)). Furthermore, evidence from European countries has shown a stronger association of egalitarianism with policy preference among higher-class individuals, arguing that higher economic risk can weaken the link between abstract human values and redistribution ([Kulin & Svallfors, 2013](#)). Also, the relation of egalitarianism has been addressed in health policy preferences, where higher egalitarianism predicts higher support for public health provision and higher social spending on preventive health but null support for progressive taxation for health policies ([Azar et al., 2018](#)).

On the side of humanitarian values, evidence has shown that among American citizens, those with stronger humanitarian values tend to support policies focused on elderly needs and poverty relief ([Feldman & Steenbergen, 2001](#)). The authors argue that humanitarian values are not blind to social inequality but rationalise social problems as part of the human condition. Regardless of the shared concerns about the justice of humanitarian and egalitarian approaches, the focus on needs by humanitarian values leads to support of specific policies rather than redistribution as a measure to accomplish the principle of equality. In this vein, a cross-national study of 28 countries has demonstrated that a solid attachment to humanitarian values is associated with a higher willingness to pay taxes for universal health care but also moderate the negative influence of risk exposure ([Maldonado et al., 2019](#)).

Subjective factors

As a brief overview, building on the early work of Kluegel & Smith (1986), 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).

Notwithstanding the long-standing contributions of the fields of subjective inequality and distributive justice, there is still a gap between this literature and the study of redistributive preferences (Condon & Wichowsky, 2020; 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 subjective social status and social comparison processes. Their micro-foundations, dynamics and causal implications for redistributive preferences should therefore be examined.

4.1 Subjective social status

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*. So 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 perception.

The study of subjective views of status has developed around the concept of subjective social status (SSS), understood as individuals' perceptions of their place in the social hierarchy (M. D. R. Evans, 2004). There are three relevant empirical and theoretical contributions. First, the “middle class” perceptual bias is the persistent tendency of individuals to place themselves in the middle of the social hierarchy, with variation across countries in terms of wealth and income inequality (Lindemann & Saar, 2014). Second, the moderate and inconsistent association with objective measures of status, such as occupational class or education (Castillo et al., 2013; Iturra & Mellado, 2018). However, income has been shown to have a strong positive effect in cross-national (Lindemann & Saar, 2014) and longitudinal studies (Chen & Williams, 2018). Furthermore, a sample of older Americans demonstrates the influence of personal wealth on rising subjective status (Andersson, 2018). Third, the literature has pointed to the role of social

comparison by developing the reference group and reality blending hypothesis (J. Kelley & Evans, 1995) as an explanatory mechanism for the above findings.

The reference groups and reality blend hypothesis (R&R-blend) was suggested as an explanatory mechanism of subjective social status (M. D. R. Evans, 2004; J. Kelley & Evans, 1995), relying on two core assumptions. First, objective circumstances are represented by individuals' location on the social hierarchy, characterised by socioeconomic characteristics such as income or wealth, educational level, or occupation. In other words, these "material forces" can influence subjective status and class identification but are not the only explanatory factors (J. Kelley & Evans, 1995). On the other hand, it is suggested that socioeconomic status entails "social closure" generated by homophily, arguing that the socioeconomic composition within and between reference groups can influence perceived inequality (M. D. R. Evans, 2004). These circumstances contribute to the "subjective sampling" phenomenon, described as a type of availability heuristic through which perceived images of society are systematically biased (M. D. R. Evans & Kelley, 2017). As a result, the joint forces of material conditions and the composition of reference groups lead individuals to misperceive the size of the bottom and top groups in society and to perceive themselves in the middle of the social hierarchy.

The social comparison theory (Festinger, 1954) suggests that individuals evaluate themselves compared to reference groups. Comparison can be performed across objective or subjective domains, like physical ability or opinions, but also about individuals' or groups' economic wealth or social prestige. Previous contributions from social psychology on Equity Theory (Adams, 1965) assume an exchange situation between individuals of similar characteristics, where proportionality of outcomes regarding inputs is expected. Therefore, the justice evaluation will be a function of the input and output equivalence. Additionally, sociological contributions from the Relative Deprivation Theory (Merton & Rossi, 1968) highlight the role of perceptions about reference groups in the evaluation process. Therefore, the inequality assumption regarding social status is crucial for evaluating the outcome of an exchange between two *asymmetric* actors. Finally, the distributive justice literature has suggested that judgments about distributional outcomes are linked with previous perceptions of actual distribution (Wegener, 1990). Therefore, the social status of the observer can lead to illusionary distributional perceptions that consequently could bias distributional judgments (Wegener, 1987).

4.2 Social comparison and redistributive preferences

An essential component to link social comparison processes and preferences for redistribution relies on *who* are the target individuals or groups under comparison. The previous argument suggests that *Ego's* perceived social status is generated by social comparison processes, which can be theoretically explained by the mechanism described in the R&R-blend hypothesis. However, this approach assumes that social comparison *always* focuses on individuals with similar features from the nearest network but does not consider the contact with individuals or groups of different social status that could lead to variations in perceptual outcomes derived from an *asymmetric* social comparison. Thus, recent evidence in social psychology suggests that studying social comparison comprises three aspects that need to be considered: *direction* (e.g., upward, downward), *target* (e.g., friend, stranger), and *dimension* (e.g., status, appearance) (Arigo et al., 2020). Therefore, an expectation is that individuals of low (high) subjective status experience more (less) relative deprivation (Smith et al., 2020). Furthermore, it has been suggested that upward comparisons trigger negative judgments about economic distribution and feelings

of deprivation that boost negative perceptions about economic inequality (Jasso, 1990), decreasing life satisfaction and subjective well-being (Olivos et al., 2020). In this regard, the literature directly addressing the role of social comparison and subjective social status on redistributive preference is scarce. However, cross-sectional and experimental evidence has shown some possibilities to address the link.

4.2.1 Imagined economic others

Condon & Wichowsky (2020) conducted an experimental study on American individuals to test the hypothesis that upward (downward) comparison should derive in more (less) demand higher government's responsibility to reduce income differences between the rich and poor. Nevertheless, they found that upward social comparison had a null effect on global redistribution but increased the demand for social security, education, food, and unemployment insurance. They also demonstrate that the upward comparison causal effect is higher among middle-higher income groups, explaining that individuals with incommensurable wealth and power generally represent the "imagined" rich other.

4.2.2 Frequency of contact

A study by García-Castro et al. (2022) scrutinises the association of different perceived economic inequality measures on redistributive preferences in a cross-national sample of 22 countries. Their results show a positive influence of both downward and upward experiences of social comparison operationalised through the following question: "How often do you have any contact with people who are a lot richer [poorer] than you when you are out and about"? These results provide the possibility of understanding to what extent social comparison can be associated with other dimensions of perceived economic inequality. However, an open question is related to the hypothetical conditional effect of social comparison across income groups, as was demonstrated by Condon & Wichowsky (2020). In other words, do social comparison experiences have the same influence on redistributive preferences among low and high-income individuals?

4.2.3 Perceived income distance

Another study by Cansunar (2021) employed cross-sectional data from the ISSP inequality module to test if overestimating the income of the rich as the reference group and underestimating subjective status increases demand for progressive taxation. Drawing on an adaptation of the justice income evaluation function (Jasso, 1999), the author operationalises the individual income distance to a company's CEO as the high-status reference group. The results demonstrate that individuals that perceive themselves in the middle-class support higher progressive taxes. Similarly, high-income individuals support progressive taxation when they locate themselves on the top of the social hierarchy and believe others earn significantly more than them (Cansunar, 2021, p. 7). In other words, support for progressive taxation increases as subjective status is lower and is higher when the perceived distance from the CEO increases.

4.2.4 Social networks as reference groups

(To be developed)

The R&R hypothesis suggests a theoretical link between acquaintance social networks and subjective views about economic inequality. Thus, the role of network composition will be discussed as a source of social comparison. The assumption here is that the size and composition of social networks influence perceptions about income inequality.

A study by Kim & Lee (2021) demonstrates that a network with high-status individuals increases subjective social status in China and Taiwan, but has a null effect in Japan and Korea.

Proposition 1: high socioeconomic diversity of the network will increase subjective social status.

Contextual factors

(To be developed)

5.1 Economic inequality

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.

5.2 Social distance and Spatial Segregation

“inferences about the causes of inequality, people draw on lessons from past experience and information about the world, both of which are biased and limited by their background, social networks, and the environments they have been exposed to” ([Mijs, 2018](#))

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)

6.1 Paper 1

Title: Income Inequality, social comparison and preferences for redistribution: cross-sectional and longitudinal evidence

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)

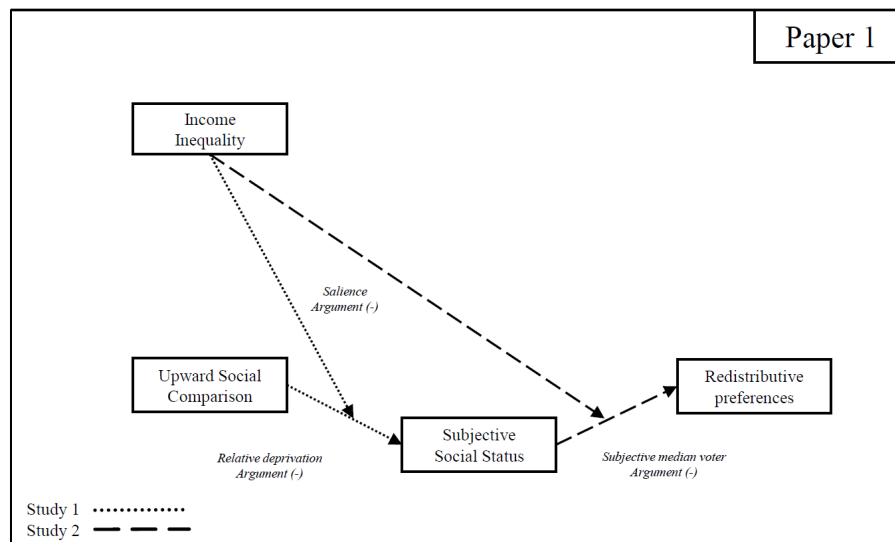


Figure 6.1: Theoretical model for paper 1

6.1.1 Data, variables and methods

Data

- ISSP Social inequality 1987-2019

Methods

- hybrid multilevel ([Schmidt-Catran & Fairbrother, 2016](#))

6.2 Paper 2

Pending.

6.3 Paper 3

Pending.

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