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Programa de Doctorado en Psicología

TIPOS DE MOVILIDAD SOCIAL Y EL MANTENIMIENTO DE LA DESIGUALDAD

TYPES OF SOCIAL MOBILITY AND THE MAINTENANCE OF INEQUALITY

Juan Antonio Matamoros Lima

Directores:

Guillermo B. Willis Sánchez

Miguel C. Moya Morales

UNIVERSIDAD DE GRANADA

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A mis padres

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REFERENCIAS Y MATERIAL SUPLEMENTARIO

Resumen

Las sociedades contemporáneas se encuentran jerarquizadas a través de clases sociales (Kerbo, 2010; Piketty, 2014), y van desde posiciones más altas en la estructura social —clase alta— hasta las posiciones más bajas —clase baja—. Las clases sociales se diferencian entre sí por el asimétrico acceso a los bienes materiales y de servicios (Moya & Fiske, 2017; Müller & Pollak, 2015). Cuanto mayor sea la posición social en la estructura social mayor acceso a estos recursos. Estas posiciones en la estructura social pueden llegar ser intercambiadas, desplazándose de unas posiciones sociales a otras. Este fenómeno ha sido definido como *movilidad social.*

Esta tesis doctoral tiene como objetivo principal estudiar las creencias en la movilidad social —movilidad social subjetiva— y algunas de sus consecuencias psicosociales. El documento se conforma por varios apartados. La parte teórica se compone de cuatro capítulos. En el Capítulo 1, realizamos una revisión sobre la estratificación social y las clases sociales. En el Capítulo 2, abordamos diferentes nociones del constructo "movilidad social". En el Capítulo 3, revisamos la literatura sobre los correlatos de las creencias en la movilidad social. Finalmente, en el Capítulo 4, planteamos las preguntas de investigación y objetivos específicos que guiaron este trabajo.

La parte empírica de la tesis está compuesta por tres capítulos (todos ellos redactados en inglés). El Capítulo 5, lo integran dos estudios correlacionales. En este capítulo nos planteamos: 1) determinar en qué medida las personas en España perciben con exactitud la movilidad social real; 2) examinar si existen diferencias entre las creencias en la movilidad personal y societal; 3) estudiar si las creencias meritocráticas afectan a las creencias en la movilidad personal y societal. Nuestros resultados mostraron que las personas en España no perciben con exactitud la movilidad social económica real existente. Además, las personas tienen creencias pesimistas sobre la movilidad social

existente en el país (i.e., movilidad societal), y optimistas sobre su propia movilidad social futura (i.e., movilidad personal). También, encontramos que las creencias meritocráticas no se relacionan ni con las creencias en la movilidad societal ni personal de las personas españolas.

En el Capítulo 6, incluimos dos estudios correlacionales en los cuales desarrollamos un instrumento que nos permitiera discriminar entre dos tipos diferentes de creencias en la movilidad social: ascendente y descendente. Nuestros resultados mostraron que la escala bidimensional de creencias en la movilidad social (BSMBS, en inglés) presenta distintas evidencias de validez y fiabilidad. Demostramos que la BSMBS discrimina entre dos tipos de creencias en la movilidad social según su trayectoria: ascendente y descendente. En todas las correlaciones con los diferentes constructos analizados, la movilidad social ascendente mostró efectos positivos para las actitudes hacia la desigualdad, creencias meritocráticas y justificación del sistema económico, y negativos para la ansiedad por el estatus. Por el contrario, la movilidad descendente mostró el resultado opuesto para cada una de estas relaciones.

En el Capítulo 7, nos propusimos analizar el efecto de las creencias en la movilidad social ascendente y descendente sobre las actitudes hacia la redistribución, así como estudiar varios mecanismos psicológicos que pudieran explicar este efecto. A lo largo de tres estudios (uno correlacional y dos experimentales) en dos países diferentes (España e Italia) observamos que la movilidad societal ascendente se relaciona negativamente con las actitudes hacia la redistribución, mientras que la movilidad societal descendente positivamente. Además, encontramos que las creencias meritocráticas mediaban el efecto de la movilidad societal ascendente sobre las actitudes hacia la redistribución, y que la percepción de riesgo económico percibido mediaba el efecto de movilidad societal descendente sobre las actitudes hacia la redistribución.

Por último, en el Capítulo 8, se discuten los resultados en función de las preguntas de investigación planteadas. También, se señalan las implicaciones, limitaciones, y futuras líneas de investigación de este trabajo. Finalmente, se presenta una conclusión (en inglés) de los resultados de la presente tesis doctoral.

En términos generales, en esta tesis encontramos que las personas en España tienen una visión sesgada de la movilidad social económica existente; en concreto, presentan una visión optimista sobre su propia movilidad social. También, encontramos que las creencias en la movilidad social ascendente y descendente pueden ser considerados constructos diferentes, con consecuencias diferentes para el mantenimiento de la desigualdad económica. Así, mientras que la movilidad ascendente promueve el mantenimiento de la desigualdad económica, la movilidad descendente favorece el cambio hacia sociedades más igualitarias.

Abstract

Contemporary societies are hierarchized along social classes (Kerbo, 2010; Piketty, 2014), ranging from the highest positions in the social structure—upper class— to the lowest positions—lower class. Social classes differ from each other by asymmetric access to material and service goods (Moya & Fiske, 2017; Müller & Pollak, 2015). The higher the social position in the social structure the greater the access to these resources. These positions in the social structure can be exchanged, moving from one social position to another. This phenomenon has been defined as *social mobility*.

This doctoral thesis has as its main objective to study social mobility beliefs — subjective social mobility— and their psychosocial consequences. This is composed of several sections. The theoretical part is composed of four chapters. In Chapter 1 we review social stratification and social classes. In Chapter 2 we address different notions of the construct of "social mobility". In Chapter 3 we review the literature on the correlates of social mobility beliefs. Finally, in Chapter 4, we pose the research questions and specific objectives that guided this work.

The empirical part of the thesis is composed of three chapters. Chapter 5 consists of two correlational studies. In this chapter, we set out to 1) determine to what extent people in Spain accurately perceive real social mobility; 2) examine whether there are differences between beliefs in personal and societal mobility; 3) study whether meritocratic beliefs affect beliefs in personal and societal mobility. Our results showed that people in Spain do not accurately perceive the actual economic social mobility. Moreover, people have pessimistic beliefs about the existing social mobility in the country (i.e., societal mobility), and optimistic beliefs about their future social mobility (i.e., personal mobility). Also, we found that meritocratic beliefs do not explain Spanish individuals' societal or personal mobility beliefs.

In Chapter 6, we included two correlational studies through which we developed an instrument that allows us to discriminate between two different types of social mobility beliefs: upward and downward. Our results showed that the Bidimensional Social Mobility Beliefs Scale (BSMBS) has various validity and reliability evidences. We showed that the BSMBS discriminates between two types of social mobility beliefs according to their trajectory: upward and downward. In all correlations with the different constructs analyzed, upward social mobility showed positive effects for attitudes towards inequality, meritocratic beliefs, and justification of the economic system, and negative effects for status anxiety. In contrast, downward mobility showed the opposite result for each of these relationships.

In Chapter 7, we set out to analyze the effect of upward and downward social mobility beliefs on attitudes toward redistribution and to study various psychological mechanisms that explain this effect. Throughout three studies (one correlational and two experimental) in two different countries (Spain and Italy), we observed that upward societal mobility is negatively related to attitudes towards redistribution, whereas downward societal mobility is positive. Furthermore, we found that meritocratic beliefs mediated the effect of upward societal mobility on attitudes toward redistribution, and that perceived economic risk mediated the effect of downward societal mobility on attitudes toward redistribution.

Finally, Chapter 8 discusses the results based on our research questions. Also, the implications, limitations, and future lines of research of this work are pointed out.

Overall, in this thesis we found that people in Spain have a biased view of actual economic social mobility; in short, they present an optimistic view of their social mobility. Also, we found that upward and downward social mobility beliefs can be considered different constructs, with different consequences for the maintenance of

economic inequality. In particular, while upward mobility promotes the maintenance of economic inequality, downward mobility favors change toward more egalitarian societies.

CAPÍTULOS TEÓRICOS

THEORETICAL CHAPTERS

Capítulo 1

Estratificación Social y Clases Sociales

1.1 Estratificación social

"El *homo sapiens* es siempre, y en la misma medida, *homo socius*" (Berger & Luckmann, 2015, p. 70). Esta afirmación, la cual también desarrollaría en profundidad el sociólogo Durkheim (2014), pone de manifiesto la condición social del ser humano. Desde esta perspectiva, denominamos *sociedad* a "un sistema de interrelaciones que vincula a los individuos" (Giddens & Sutton, 2014, p. 44). Cuando existe un orden establecido de los individuos en la sociedad, y cómo se distribuyen los individuos en las diferentes posiciones que la componen, hablamos de *estructura social* (Requena et al., 2013).

Con respecto al estudio de las estructuras sociales existen principalmente dos grandes aproximaciones (Dahrendorf, 1979): la perspectiva cultural y la perspectiva relacional. La primera, se centra en las normas, creencias y valores que regulan la sociedad (Parsons, 1968). La segunda, en las relaciones sociales entre individuos, grupos, instituciones, organizaciones, y comunidades. Desde la perspectiva relacional, destaca la obra de Karl Marx (1818-1883), en la que se describe la estructura social como un sistema de relaciones entre individuos de diferentes clases sociales, en las que unas clases explotan a otras.

Siguiendo a Atkinson (2015), para entender el modo desigual en el que están distribuidos los recursos en la sociedad, habría que responder a dos cuestiones fundamentales: *¿desigualdad de qué?* y *¿desigualdad entre quiénes?* Siguiendo este planteamiento, *grosso modo,* la *desigualdad económica* hace referencia a la distribución asimétrica de los recursos materiales o bienes considerados valiosos entre personas o grupos de un contexto determinado (Brown-Iannuzzi et al., 2017; Keeley, 2018; Peterson, 2017).

Uno de los primeros pensadores que abordaron la desigualdad entre los individuos de manera teórica fue el filósofo Jean-Jacques Rousseau en su obra *Discurso sobre el origen y los fundamentos de la desigualdad entre los hombres* (Rousseau, 1754/2012). En esta obra, Rousseau diferencia entre la desigualdad natural —consecuencia de las características individuales: psicológicas y biológicas— y la desigualdad social, que se refiere a la condición desigual de acceso a recursos, servicios y posiciones a las que la sociedad les da un valor. Mientras que la desigualdad natural no da cualidad de orden o jerarquización, la desigualdad social tiene relación con las posiciones en la estructura social (Kerbo, 2010), y "se halla establecida, o al menos autorizada, por el consentimiento de los hombres" (Rousseau, 1754/2012, p. 231). En este sentido, la desigualdad económica no tiene un origen natural, por el contrario, la desigualdad económica responde a un proceso de construcción social (Otero et al., 2011).

En 1966, Gerhard Lenski escribe *Poder y privilegio: una teoría de la estratificación social*, tal vez una de las obras más completas en el estudio de la estratificación social. Para intentar dar forma al concepto de estratificación social, Lenski, parte del siguiente interrogante: *¿quién recibe qué y por qué?* Desde esta perspectiva, entendemos la *estratificación social* como un sistema de relaciones sociales jerarquizado que determina quién recibe qué y por qué (Kerbo, 2010), que es constante, estable a lo largo del tiempo, y que se encuentra legitimado (Giner et al., 2013).

Existen diversos enfoques y sistemas de estratificación social. En general, la mayoría de los científicos sociales distinguen históricamente 5 tipos de sistemas de estratificación social: 1) sociedades comunales primitivas, 2) esclavitud, 3) sociedades de castas, 4) sociedades estamentales o feudales, y 5) sociedades de clases; y se distinguen en base a diferentes características: el grado de movilidad entre las diferentes divisiones, el método para ubicar a la gente según la clase o estatus, la forma de legitimación del

sistema, y la forma de desigualdad existente (Kerbo, 2010; para una revisión más extensa y detallada ver Lenski, 1993).

A lo largo de la historia, se fue produciendo un cambio desde el modelo de producción con base agraria a otro con base en la manufactura y la urbanización. Durante el periodo feudal, las diferencias entre los seres humanos eran atribuidas a los dioses y justificadas por la moralidad y los valores religiosos de la época (Pirenne, 2015). El periodo de la Ilustración marca el fin del feudalismo y el comienzo de un periodo donde la *razón* es la única herramienta legítima para explicar el mundo. La estratificación social deja de ser legitimada por principios morales y religiosos y en su lugar se adopta la "razón" como imperativo categórico (Kant, 2012). Como consecuencia, se sustituyen las interpretaciones moralistas y religiosas por la racionalización del orden social, las diferencias entre los seres humanos son atribuidas al logro individual, y son justificadas por las ideologías (e.g., igualdad de oportunidades, meritocracia; Feagin, 1975; Huber & Form, 1973). El desarrollo histórico de las sociedades tiene como consecuencia la evolución del constructo de estratificación social (Giddens, 2000), hasta llegar a la definición ligada a las sociedades de clases.

1.2 Clases sociales en las sociedades de clases

Las primeras reflexiones teóricas sobre las clases sociales en Europa datan de la época clásica en la Antigua Grecia. Platón (427-347 a.C.), en su tratado *La República*, ya identificaba la división de clases sociales en la estructura de la sociedad griega. Según la concepción platónica de la sociedad, en la configuración de un Estado Ideal las personas pertenecerían a una de las tres clases sociales existentes: artesanos, guerreros y gobernantes, según sus atribuciones específicas (Platón, 370 a.C./2013). Posteriormente, Aristóteles (384-322 a.C.), en su obra *Política,* presentaría a la sociedad griega como una

sociedad jerarquizada, donde en la cúspide estarían los hombres libres. Estos, se diferenciarían del resto de las personas de manera natural, por su alma, para lo cual añadiría: "existen, pues, en ella por naturaleza lo gobernante y lo gobernado. De una y otra parte afirmamos que poseen una virtud diferente…De modo que por naturaleza la mayoría de las cosas se componen de gobernantes y gobernados" (Aristóteles, 323a.C./ 2021, p. 87).

En la Edad Media, la pertenencia en Europa a una u otra clase social estaba determinado por la propiedad de la tierra, y la concepción de la desigualdad social como orden natural (Pirenne, 2015). La Edad Moderna se caracteriza por un periodo histórico de muchos cambios sociales, políticos y económicos, por ejemplo: paso de una económica agraria a una mercantil, aparición de una nueva clase social, "la burguesía", que controlaba el proceso de producción; aparición de las primeras monarquías autoritarias, etc. Las transformaciones socio-económicas derivadas sentaron las bases para el desarrollo del capitalismo industrial (Polanyi, 2017), y con ello, de la sociedad de clases. El *sistema de clases*, tal y como es concebido en la actualidad, *surge* con la aparición de las sociedades industrializadas y el sistema de producción fordista (i.e., la racionalización de los procesos de producción en serie).

Uno de los acontecimientos más influyente en el desarrollo socio-económico de la época fue la Revolución Francesa en 1789 y la Primera Revolución Industrial llevada a cabo en Gran Bretaña durante la segunda mitad del siglo XVIII (Hobsbawm, 1994/2011). A partir de este momento, la desigualdad existente entre las clases sociales pasa de ser concebida desde una perspectiva naturalista a una social; esto es, la desigualdad se entiende como un producto derivado de la sociedad y no de la naturaleza humana, o del orden divino. En este contexto histórico, las ciencias sociales comienzan a interesarse por los procesos de estratificación social y las clases sociales; surgen las

primeras aproximaciones teóricas para intentar explicar la existencia, persistencia, y justificación de la estratificación social (Crompton, 1994).

En el siglo XIX, destacan las aportaciones de Karl Marx (1818-1883) y Max Weber (1864-1920) para explicar la sociedad y su estructura social de clases. Marx, plantea que para entender las sociedades es indispensable estudiar las "condiciones materiales" de la existencia humana (Marx & Engels, 1932/2014). Sin embargo, Marx fallece cuando se encontraba trabajando sobre una definición exacta del constructo de "clase social" en el tercer volumen de su obra *El Capital* (1867/2017). Este hecho hace que en la literatura tan sólo existan diferentes inferencias sobre la conceptualización teórica del término basadas en sus escritos. Aun así, una de las definiciones más extendidas es la que define la *clase social* como un grupo de personas que comparten una relación con los medios de producción (Requena et al., 2013). Una de las diferencias más notables entre la perspectiva marxista y la weberiana sobre la conceptualización de la clase social es que, para Max Weber, la clase es principalmente una característica "objetiva", y sólo bajo algunas circunstancias concretas, la clase puede ser "subjetivamente" consciente (Giddens, 2000). Weber hace una clara distinción entre *estatus* (i.e., relacionado con el consumo, y estilos de vidas concretos) y *clase* (i.e., relacionadas con el modo de producción y el mercado; Weber 1922/2014).

A lo largo del siglo XX se produce un notable incremento de estudios interesados en los procesos de estratificación y clases sociales (Giddens, 2000; Kerbo, 2010). Los primeros estudios surgen en el marco del Crack de 1929 y la posterior Gran Depresión, dos de los acontecimientos económicos de mayor impacto social en el siglo XX (Hobsbawm, 1962/2017). Esta ola de investigaciones intentará responder a la controversia entre la oposición de las corrientes marxista y weberiana sobre las dimensiones objetivas y subjetivas de clase (Crompton, 1994).

1.3 Perspectiva psicológica en el estudio de las clases sociales

En las últimas décadas la psicología social también ha mostrado un especial interés en el estudio de las clases sociales. La perspectiva psicosocial toma como referencia los estudios previos llevados a cabo en otros campos de las ciencias sociales, y define la clase social como "un sistema de estratificación basado en el acceso a recursos como la riqueza, la propiedad, el poder y el prestigio" (Moya & Fiske, 2017, p. 9). Sin embargo, debido a la complejidad (Manstead et al., 2020) son muchos los intentos llevados a cabo para la conceptualización del constructo (ver Antonoplis, 2023), así como para su operacionalización (Oakes & Rossi, 2003).

En términos objetivos, la clase social suele estar determinada por una combinación de tres tipos de recursos: económicos (Piff & Moskowitz, 2018), educativos (Snibbe & Markus, 2005; Stephens et al., 2007) y el prestigio ocupacional (Na et al., 2018; Oakes & Rossi, 2003). En términos subjetivos, la clase social está relacionada con la percepción de clase en comparación con otros en la jerarquía de clase social (Adler et al., 2000; Kraus et al., 2011). Investigaciones previas han mostrado que la percepción subjetiva de la clase social puede afectar a diversos estados y comportamientos humanos, independientemente de la clase objetiva (Adler et al., 2000; APA, 2007; Kraus & Stephens, 2012; Kraus et al., 2012; Rubin et al., 2014).

Cuando se les pregunta a las personas por su posición en la estructura social piensan más fácilmente en dimensiones del estatus socioeconómico, que en términos categóricos de clase social (e.g., clase trabajadora, clase media, etc.). Por esta razón, las diferencias de estatus (i.e., indicadores objetivos: ingresos, educación, prestigio ocupacional; y subjetivo: estatus socioeconómico subjetivo), han sido uno de los criterios más utilizados en la perspectiva psicosocial. Esto es, un gran número de investigaciones psicosociales sobre la clase social se han focalizado en el estatus socioeconómico objetivo

(en base a los ingresos y/o logros educativos), y/o en el estatus socioeconómico subjetivo, y no tanto, en la clase social definida en términos de relación con los medios de producción (Manstead, 2018).

Estatus Socioeconómico Objetivo

La psicología social ha operacionalizado el estatus socioeconómico objetivo principalmente en base a tres indicadores objetivos, los cuales describen las condiciones materiales de las personas (Antonoplis, 2023; Kraus & Stephens, 2012; Manstead, 2018): 1) ingresos (Piff & Moskowitz, 2018); 2) nivel académico (Stephens et al., 2007); 3) prestigio ocupacional (Na et., 2018). Las diferencias entre los diferentes indicadores representarían la posición en la jerarquía social.

La importancia de los ingresos como indicador objetivo de clase reside en la cualidad de los ingresos como producto de intercambio, ya sea por bienes materiales o de servicios (Kraus & Stephens, 2012). Los ingresos han sido relacionados con comportamientos sociales (Bianchi & Vohs, 2016), rasgos de personalidad (Piff, 2014) o respuestas emocionales (Piff & Moskowitz, 2018). El nivel educativo ha sido considerado el camino para llegar a posiciones más altas en términos de ingresos u ocupación (Snibbe & Markus, 2005). El prestigio ocupacional, por su parte, ha sido relacionado negativamente con el riesgo de mortalidad (Christ et al., 2012) y positivamente con la salud subjetiva (Fujishiro & Gong, 2010).

Los indicadores objetivos de estatus se han utilizado de manera alternativa dependiendo de las muestras objeto de estudio. En población general suele utilizarse tanto los indicadores de manera independiente (Van Doesum et al., 2017), como utilizando una media entre dos o más indicadores (Eom et al., 2018; Kraus et al., 2009; Piff et al., 2010; Pinquart & Sörensen, 2000). Sin embargo, en muestras universitarias suelen utilizarse

diferentes indicadores ponderados relativos al hogar —ingresos del hogar— o los progenitores del participante (Kraus et al., 2009).

Los indicadores objetivos de estatus socioeconómico mencionados (i.e., ingresos, educación y ocupación) suelen estar relacionados entre sí de manera consistente (e.g., ver Singh-Manoux et al., 2003). No obstante, una reciente investigación llevada a cabo por Moya y Alcañiz-Colomer (2023) sugiere que estos indicadores podrían tener efectos diferentes, al menos, sobre la conducta prosocial de las personas. En concreto, los autores encontraron que, mientras que la educación se relacionó positivamente con la mayoría de tipos de conducta prosocial medidos, los ingresos lo hicieron de forma inconsistente (efectos negativos o no significativos).

Estatus Socioeconómico Subjetivo

La tradición psicológica ha puesto de manifiesto la importancia de la realidad subjetiva (frente a la objetiva) para explicar el comportamiento humano (Asch, 1952; Davidai et al., 2012). Por ejemplo, investigaciones previas han señalado como la desigualdad económica subjetiva (Castillo et al., 2022; Schmalor & Heine, 2022; Willis et al., 2022) tienen consecuencias importantes por encima de sus contrapartidas objetivas.

Siguiendo esta perspectiva, la psicología social ha resaltado la importancia de la percepción subjetiva a la hora de conceptualizar y medir la clase social y/o el estatus socioeconómico (Adler et al., 2000; Antonoplis, 2023; Manstead, 2018; Kraus et al., 2009; Singh-Manoux et al., 2003). Por ejemplo, los estudios llevados a cabo por Kraus et al. (2011) sostienen que las diferencias en riqueza, educación y ocupación de las personas crean identidades culturales que se basan en percepciones subjetivas de la posición social en relación con los demás. Del mismo modo, Fiske (2012) sugiere que las percepciones subjetivas de la clase podrían explicarse a través de la *teoría de la comparación social*

(Festinger, 1954). Esto es, las personas podrían definir su riqueza y/o ingresos, su prestigio ocupacional, y educación, en comparación con otras personas de su comunidad, país o su grupo de referencia (Adler et al., 1994; Anderson et al., 2015; DiMaggio, 2012).

Como se ha expuesto anteriormente, la clase social subjetiva se ha medido a través de ítems con respuestas múltiples y opciones categoriales, donde la persona selecciona la clase social con la que más se identifique (e.g., clase media, trabajadora, etc.). Sin embargo, otra forma comúnmente utilizada para medir la clase social subjetiva es a través del estatus socioeconómico subjetivo. A diferencia de la clase social subjetiva, el estatus socioeconómico subjetivo no se basa en la relación con los medios de producción sino en la posición que la persona cree que ocupa en la escala social en comparación con el resto de miembros del grupo (Manstead, 2018). Uno de los instrumentos más utilizados para medir el estatus socioeconómico subjetivo es la Escala MacArthur de Estatus Social Subjetivo (Adler et al., 2000). Esta escala evalúa la posición social en una estructura jerarquizada percibida por una persona en base a sus ingresos, educación y ocupación, en relación con otras personas (generalmente, la sociedad en general). Se presenta en forma de escalera de 10 peldaños, donde en la parte más alta de la escalera se encontrarían las personas con más recursos económicos, mayor nivel educativo y mejores ocupaciones, mientras que en la parte más baja se encontrarían las personas con menos recursos económicos, menor nivel educativo y peores ocupaciones.

La Escala MacArthur de Estatus Social Subjetivo presenta una buena fiabilidad test-retest, como muestra un estudio llevado a cabo por Operario et al. (2004), en el que compararon las respuestas de los participantes a lo largo de 6 meses. Recientemente, Navarro-Carrillo et al. (2020) han propuesto una adaptación de la escala original, separando los tres indicadores de estatus subjetivo:1) basado en la percepción subjetiva de la posición social basada en los recursos económicos; 2) basado en la percepción

subjetiva de la posición social basada en el nivel educativo; 3) basado en la percepción subjetiva de la posición social basada en la ocupación. En la investigación, los autores encontraron que las escalas basadas en la educación y la ocupación predecían el bienestar psicológico de los participantes, independientemente de los indicadores de estatus socioeconómico objetivo (ingresos, educación y ocupación), y de la Escala MacArthur de Estatus Social Subjetivo original.

En las últimas décadas, un gran número de investigaciones en el campo de la psicología social han puesto de manifiesto la importancia del estatus socioeconómico subjetivo en diversas dimensiones de la vida social (e.g., Fiske & Markus, 2011; Markus & Kitayama, 2003; Stephens et al., 2011). Por ejemplo, el estatus socioeconómico subjetivo se ha relacionado negativamente con el riesgo de mortalidad (Matthews & MacDorman, 2008), salud psicológica (e.g., Adler et al., 1994; Cundiff & Matthews, 2017; Gallo & Matthews, 2003), y bienestar subjetivo (e.g., Diener et al., 2010; Howell & Howell, 2008; Tan et al., 2020). Las personas del mismo estatus socioeconómico subjetivo tienen a vivir en los mismos barrios, ir a los mismos centros educativos, realizar las mismas actividades (e.g., DiMaggio, 2012; Kraus et al., 2013; Ridgeway & Fisk, 2012), y presentar las mismas preferencias estéticas (Snibbe & Markus, 2005). También, tienden a compartir normas, valores, y orientaciones sociales (e.g., Kraus et al., 2009; Kraus et al., 2011; Markus & Kitayama, 2003; Snibbe & Markus, 2005; Stephens et al., 2007). Todo ello contribuye a que el estatus socioeconómico subjetivo afecte a la visión que las personas tienen de ellas mismas (Stephens et al., 2007), así como a su identidad social (Easterbrook et al., 2020).

El estatus socioeconómico subjetivo también se ha relacionado con diversas creencias, tales como: la meritocracia (Li & Hu, 2021; Mijs, 2021); el autoritarismo de derecha (Carvacho et al., 2013); la orientación a la dominancia social (Carvacho et al.,

2013); creencia en un mundo justo (Hunt, 2000); la justificación del sistema (Jost et al., 2003); la legitimidad del sistema (Brandt et al., 2020); o las actitudes hacia la desigualdad (Cheng et al., 2019; LA Roex et al., 2019).

Capítulo 2

Movilidad Social

2.1 Definición y tipos de movilidad social

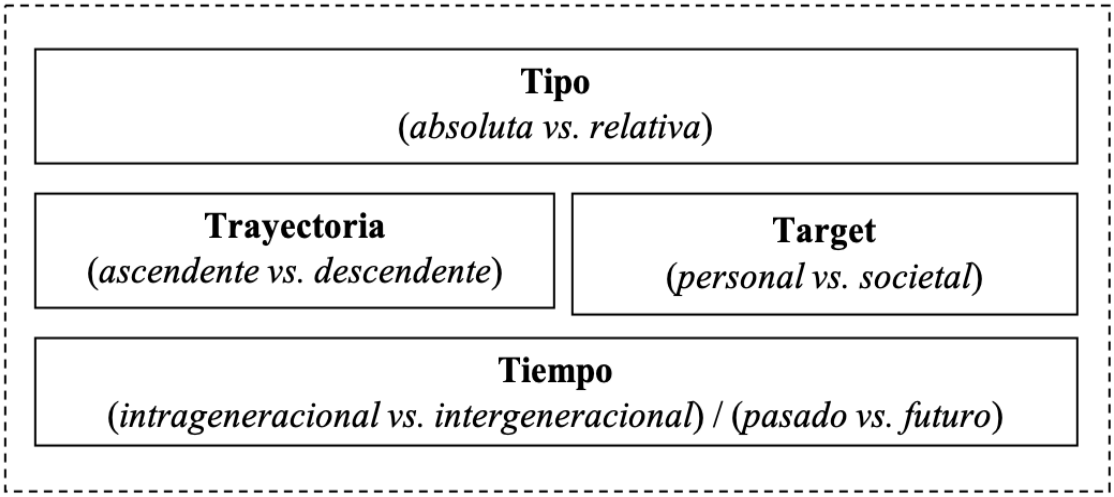
En el capítulo anterior se presentó a la clase social como una de las características más importantes de la estructura social de clases. En el presente capítulo se tratará cómo en las sociedades de clases las personas pueden cambiar su clase social, es decir, pueden moverse entre las diferentes clases sociales.

La movilidad social de clases es un constructo ambiguo y controvertido, ya que está influenciado por los múltiples enfoques teóricos y metodológicos desde los que se aborde (Echeverría, 1999; Kerbo, 2010). Los distintos enfoques de los estudios sobre movilidad social tienen en cuenta los indicadores objetivos y subjetivos de clase o estatus socioeconómico (objetivos y subjetivos) mencionados, y su selección varían según el campo de estudio (Hout, 2015).

Desde la precursora obra de Pitirim Sorokin (1927), *Social Mobility,* las ciencias sociales, en mayor medida la sociología y la economía, han enfatizado la importancia de la interpretación objetiva de la movilidad social (Chetty et al., 2017; Corak, 2013, 2016; Fachelli, 2019; Marqués-Perales & Fachelli, 2021; Piketty, 1995; para un análisis más detallado de los estudios de movilidad social desde una perspectiva sociológica ver Echeverría, 1999). Sin embargo, de manera complementaria, la perspectiva psicosocial se ha centrado en mayor medida en una interpretación subjetiva, esto es, en las creencias sobre la movilidad social (Browman et al., 2021; Davidai & Gilovich, 2015a; Day & Fiske, 2016; Kraus & Tan, 2015; Wang et al., 2022). A partir de esta visión deriva la conceptualización de la movilidad social desde un plano objetivo hacia uno subjetivo. Por tanto, la movilidad social subjetiva se entiende como la percepción subjetiva de la diferencia del estatus socioeconómico de una persona a lo largo del tiempo (Davidai & Wienk, 2021; Day & Fiske, 2019; Gimpelson & Monusova, 2014; Mijs et al., 2022; Präg & Gugushvili, 2021; Ritterman et al., 2015).

Desde la psicología social se han llevado a cabo diversas aproximaciones al estudio de las creencias en la movilidad social —movilidad social subjetiva— teniendo en cuenta diferentes consideraciones (ver Figura 1; Davidai & Wienk, 2021; Day & Fiske, 2019): 1) Según el tipo de movilidad (absoluta y relativa); 2) Según la trayectoria de la movilidad (ascendente y descendente); 3) Según el target de comparación (personal y societal); 4) Según el tiempo de la movilidad (intrageneracional e intergeneracional; pasado y futuro).

Figura 1. Principales tipos de creencias en la movilidad social



Nota: Figura adaptada de Davidai y Wienk (2021)

Según la trayectoria de la movilidad, Davidai y Wienk (2021) diferencian entre ascendente y descendente. Por *movilidad ascendente* se entiende la percepción de cambio de estatus subjetivo de una persona a lo largo del tiempo hacia mejores posiciones sociales en la estructura social. Por *movilidad descendente* se entiende la percepción de cambio de estatus subjetivo de una persona a lo largo del tiempo hacia peores posiciones sociales en la estructura social. Para ilustrar las diferencias entre estos dos tipos de movilidad, veamos un ejemplo. Imaginemos a una persona con un estatus socioeconómico subjetivo medio. Si esta persona cree que mejorará su estatus socioeconómico diríamos que tiene

creencias en la movilidad ascendente. Por el contrario, si cree que empeorará su estatus socioeconómico diríamos que tiene creencias en la movilidad descendente. Aunque ambos tipos de movilidad (ascendente y descendente) hacen referencia a la movilidad a lo largo de las diferentes posiciones en la estructura social, estudios previos han encontrado bajas correlaciones entre ambos tipos de movilidad, lo cual podría sugerir que son constructos relativamente independientes (Browman et al., 2021).

Según el tipo de movilidad, Davidai y Wienk (2021) diferencian entre movilidad absoluta y relativa. La *movilidad absoluta* examina el número total de personas que pasan de un estatus subjetivo a otro en una sociedad (e.g., si el número de personas que componen la clase media ha cambiado a lo largo del tiempo). La *movilidad relativa* examina el cambio de estatus subjetivo relativo de una persona en relación con otras (e.g., una persona ha pasado de tener un estatus socioeconómico bajo a uno medio). Estos dos tipos de movilidad (absoluta y relativa) han mostrado correlaciones positivas entre sí (e.g., Tan et al., 2020).

Retomemos el ejemplo anterior. Si la persona de nuestro ejemplo (estatus socioeconómico subjetivo medio) tiene mejores condiciones de vida que sus padres (ajustado a la inflación) hablaríamos de movilidad relativa (en este caso ascendente). Sin embargo, si existe un mayor número de personas con el mismo estatus de la persona de nuestro ejemplo (estatus socioeconómico subjetivo medio) en comparación con el número de personas con un estatus socioeconómico medio que había cuando sus padres tenían su edad, hablaríamos de movilidad absoluta (en este caso ascendente). La movilidad absoluta y relativa proporcionan distintos puntos de vista sobre los procesos de movilidad social, es decir, de cómo las personas se mueven a lo largo de la estructura social.

Según el target de comparación, Davidai y Wienk (2021) diferencian entre movilidad personal y societal. Por *movilidad personal* se entiende el cambio de estatus subjetivo de una persona. Por *movilidad societal* se entiende el cambio de estatus subjetivo que se produce en la sociedad. Si seguimos con nuestro ejemplo, si una persona con un estatus socioeconómico subjetivo medio cree que mejorará su estatus socioeconómico diríamos que tiene creencias en la movilidad personal ascendente. Sin embargo, si cree que en su sociedad las personas mejoran con facilidad su estatus socioeconómico diríamos que también tiene creencias en la movilidad societal ascendente. Así, las personas pueden pensar en la movilidad en términos personales (movilidad personal) o en términos sociales generales (movilidad social), aunque es posible que las creencias en la movilidad societal afecten a las creencias en la movilidad personal (e.g., ver Day & Fiske, 2017).

Según el tiempo, Davidai y Wienk (2021) diferencian entre movilidad intergeneracional e intrageneracional; y pasado o futuro. Por *movilidad intrageneracional* se entiende el cambio de estatus subjetivo a lo largo del ciclo de vida de una persona. Por *movilidad intergeneracional* se entiende el cambio de estatus subjetivo a lo largo de una o más generaciones. Estos cambios también pueden darse hacia el pasado o hacia el futuro. Por tanto, se entiende como movilidad pasada, a la *movilidad experienciada* de una persona, y movilidad futura, a la *movilidad estimada* de una persona. Si tenemos en cuenta el ejemplo diríamos que, si una persona con un estatus socioeconómico medio cree que mejorará su estatus socioeconómico a lo largo de su vida, se hace referencia a movilidad intrageneracional futura. Si en cambio cree que su estatus socioeconómico es más alto que el de sus padres con su edad, se hace referencia la movilidad intergeneracional pasada. Por otro lado, la percepción de la movilidad en el pasado parece estar influenciada por la movilidad experienciada de las personas, la distorsión sobre el

pasado y las tendencias históricas (Day & Fiske, 2019; Gugushvili, 2020; Kelley & Kelley, 2009; Kraus et al., 2017). Por el contrario, las expectativas sobre el futuro pueden verse afectadas por el esfuerzo individual (Helzer & Gilovich, 2012), o por el optimismo sobre el futuro (Weinstein, 1980).

2.2 Operacionalización de la movilidad social

Gran parte de la investigación sobre la movilidad social se ha centrado en su dimensión objetiva (ver Echeverría, 1999). Estos estudios han operacionalizado la movilidad social como un cambio en los ingresos a lo largo de la vida (Chetty et al., 2017; Chetty, 2022; Corak, 2013; D'Addio, 2007), como un cambio hacia ocupaciones más prestigiosas (Blau & Duncan, 1967; Cabrera et al., 2021; Gimpelson & Monusova, 2014; Granström & Engzell, 2023; Kelley & Kelley, 2009; Lipset & Bendix, 1959), como un cambio hacia niveles educativos más altos, en comparación con el nivel educativo de los padres (Bukodi & Goldthorpe, 2015; Cabrera et al., 2021; Golthorpe, 2013; Veraschagina, 2012), o a través de diferentes índices de movilidad combinando dos o más de los índices anteriores (Gugushvili, 2016; Präg, 2020).

Una de las herramientas más comunes para operacionalizar la movilidad social objetiva ha sido situar a las personas en diferentes estratos sociales (e.g., quintiles, deciles) en función de sus ingresos (o renta familiar), y medir el número de personas que se mueven de unos estratos sociales a otros a lo largo del tiempo (e.g., ver Chetty et al., 2014; Jäntti, 2006).

Otra forma de operacionalizar la movilidad social objetiva basada en los ingresos (o renta familiar) es el índice de elasticidad intergeneracional de ingresos (ver Corak, 2013; D'Addio, 2007; Shariff et al., 2016). Este índice, muestra el porcentaje de ingresos relativos de los padres que explica los ingresos relativos de los hijos. El índice oscila entre

0 (los ingresos relativos de los hijos no dependen nada de los ingresos relativos de los padres, esto es, altos niveles de movilidad) y 1 (los ingresos relativos de los hijos dependen por completo de los ingresos relativos de los padres, esto es, altos niveles de inmovilidad)[1]. A través de este índice se puede comprobar si existen diferencias entre los ingresos relativos de ambas generaciones, es decir, qué grado de (in)movilidad objetiva existe. Una de las limitaciones del índice es el uso de la renta (individual o por unidad familiar) para operacionalizar la movilidad objetiva personal, ya que requiere una alta precisión en la recogida de la renta, lo que puede dar lugar a un sesgo de medición (Haider & Solon, 2006; Nybom & Stutler, 2017). Asimismo, el uso de la renta como indicador de movilidad objetiva dificulta la comparación entre países, ya que dicha información no es fácilmente accesible en muchos países en desarrollo. En esta línea, diferentes autores presentan algunas alternativas al uso de la renta para medir la movilidad social, por ejemplo: la ocupación (Gimpelson & Monusova, 2014; Kelley & Kelley, 2009) o el estatus socioeconómico subjetivo (Gimpelson & Monusova, 2014; Mijs et al., 2022; Präg & Gugushvili, 2021; Ritterman et al., 2015).

Por otro lado, las creencias en la movilidad social se han medido a través de diferentes instrumentos. Por ejemplo, utilizando la Escala MacArthur de Estatus Socioeconómico Subjetivo (Adler et al., 2000) con 10 peldaños que van de 1 (*estatus más bajo*) a 10 (*estatus más alto*), o a través de una barra deslizante web (*slider*), el cual representa los diferentes grupos de ingresos (e.g., deciles; ver Cheng & Wen, 2019). En ambos instrumentos, los participantes estiman su estatus socioeconómico en dos momentos temporales (presente y pasado y/o futuro). El índice de movilidad social se

1 A modo ilustrativo, se agrega la ecuación del índice de elasticidad intergeneracional de ingresos:
$Yit = \alpha i + \beta Yit - 1 + \mu it$. Yit, equivale a los ingresos de los hijos (generación actual); αi, es la intersección que representa el cambio promedio en ingresos de los hijos; β, es la elasticidad intergeneracional de ingresos de los hijos con respecto a los ingresos de los padres (generación anterior); Yit – 1, equivale a los ingresos de los padres (generación anterior); μit, es el error aleatorio.

calcula mediante la diferencia entre los dos estatus socioeconómicos en los dos momentos temporales. Por ejemplo, si se calcula la diferencia entre el estatus socioeconómico subjetivo en el futuro y el presente, las puntuaciones positivas reflejarían la creencia en una movilidad ascendente, mientras que las puntuaciones negativas reflejarían la creencia en una movilidad descendente (e.g., ver Bucca, 2016; Gimpelson & Monusova, 2014; Mijs et al., 2022). Sin embargo, los resultados de algunos estudios que utilizan este tipo de instrumentos han encontrado que las personas tienden a ubicarse en los puntos medios de la escalera (Castillo et al., 2013; Evans & Kelley, 2004), lo que hace que las puntuaciones de movilidad obtenidas con estos instrumentos pudieran estar sesgadas hacia los puntos intermedios.

Las creencias en la movilidad social también han sido medidas mediante la estimación numérica del porcentaje de personas que pasan de un estrato social (por ejemplo, quintil) a otro (Alesina et al., 2018; Browman et al., 2021; Davidai & Gilovich, 2015a; Davidai, 2018; Kraus & Tan, 2015). Este instrumento está formado por una imagen que muestra dos escaleras, las cuales representan la distribución de ingresos de una sociedad divida en estratos sociales, bien sean quintiles (Alesina et al., 2018; Davidai & Gilovich, 2015a) o terciles (Chambers et al., 2015). Como se puede ver en la Figura 2, la escalera de la izquierda representa la distribución de los ingresos de los padres divididos en cinco quintiles, mientras que la escalera de la derecha, representaría la distribución de los ingresos de los hijos también divididos en cinco quintiles. Los participantes deben rellenar los campos vacíos para indicar cuántos de cada 100 niños del quintil inferior pueden ascender a cada uno de los quintiles superiores cuando sean mayores.

Sin embargo, como se ha demostrado con las medidas empleadas para medir la desigualdad de ingresos con una estrategia similar, las personas suelen tener bastantes

problemas para responder a estas preguntas y entender algunos conceptos, como quintil o percentil (Bavetta et al., 2019; Gimpelson & Treisman, 2018; Hauser & Norton, 2017; Norton & Ariely, 2011). Asimismo, distintos sesgos podrían estar detrás de las respuestas a este tipo de preguntas; por ejemplo, se suele usar a las personas conocidas como punto de referencia (Hadavand, 2018), lo que suele producir un efecto de anclaje (Eriksson & Simpson, 2012; Trump, 2018). En suma, el cálculo del porcentaje de personas que cambian de un quintil —o decil o percentil— a otro puede presentar diversos problemas que impiden que sea una medida de la movilidad social con suficientes evidencias de validez.

Figura 2. Medida de escaleras de movilidad social

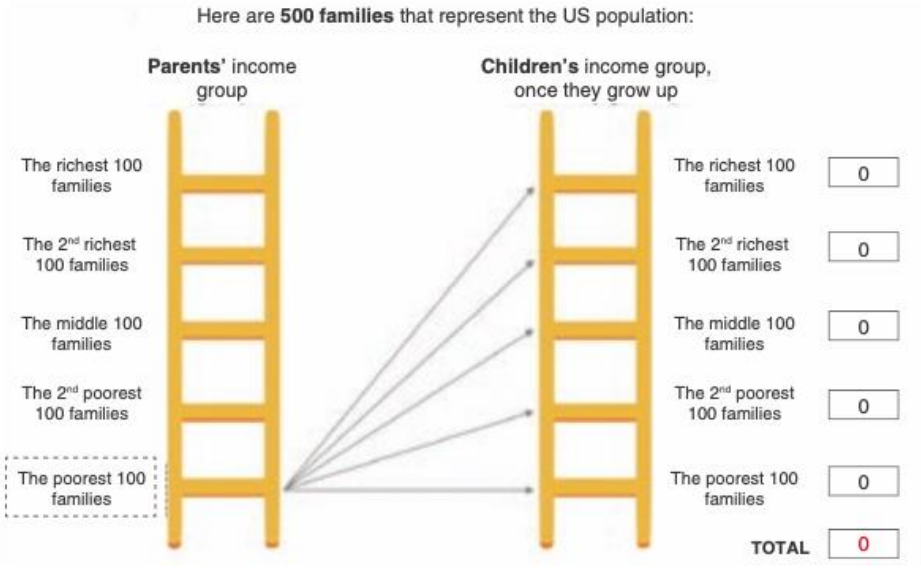


FIGURE 1. LADDER QUESTION TO ELICIT PERCEIVED MOBILITY

Nota: Figura extraída de Alesina et al. (2018)

Por último, se han utilizado diferentes escalas con respuestas tipo Likert para medir las creencias en la movilidad social. Sin embargo, los instrumentos existentes en la literatura no distinguen entre diferentes tipos de movilidad social según la trayectoria, es

decir, movilidad social ascendente y descendente. Browman et al. (2017) utilizaron una escala unifactorial de 8 ítems para medir las creencias en movilidad social (e.g., *Las personas pueden cambiar sustancialmente su estatus en la sociedad*). Esta escala discrimina entre creencias altas y bajas en movilidad (o inmovilidad), pero no discrimina la trayectoria de la movilidad: ascendente y descendente. En la misma línea, Kraus y Keltner (2013) han utilizado algunos ítems que no permiten discriminar entre movilidad ascendente y descendente (e.g., *La clase social de una persona no cambia con respecto a su clase social de nacimiento*). Por otro lado, diferentes autores (ver Bjørnskov et al., 2013; Major, 2002; Yuan & Li, 2019) han utilizado diversos ítems que podrían utilizarse para medir las creencias en la movilidad ascendente (e.g., *La gente tiene posibilidades de salir de la pobreza*). Si bien, los ítems utilizados sólo captan una de las dimensiones de las posibles trayectorias de movilidad: la movilidad social ascendente, dejando de lado los posibles efectos de la movilidad descendente.

En ocasiones, se han utilizado ítems que captan las *creencias meritocráticas* para medir las creencias en la movilidad social (e.g., ver Lumpe, 2019; Major, 2002; Major et al., 2007); sin embargo, existen importantes diferencias teóricas entre ambos constructos. Por creencias meritocráticas nos referimos a la creencia de que el paso de unas posiciones sociales a otras es debido al talento y/o al trabajo duro individual (Goldthorpe, 2003; Mijs, 2021; Trevisan et al., 2021). Siguiendo este razonamiento, las personas que ocupen las posiciones más altas en la estructura social serán las personas más talentosas y que más duro han trabajado para conseguirlo, mientras que en la parte inferior se encontrarían las personas menos talentosas y que menos duro han trabajado. Las creencias meritocráticas están basadas en atribuciones internas del éxito, es decir en el supuesto de que el éxito depende de factor personales (Mijs et al., 2022). Sin embargo, una persona también podría llegar a conseguir escalar a las posiciones más altas de la estructura social a través de

otros factores, como la suerte (e.g., un premio de lotería), recibir una herencia (Davidai & Wienk, 2021; Day & Fiske, 2016; Piketty, 2014), o a través de su capital social (i.e., recursos actuales y/o potenciales conectados a una red social, Bourdieu, 2019; ver Chetty et al., 2022). Por tanto, teniendo en cuenta que existen diferentes causas relacionadas con el movimiento de unas posiciones sociales a otras, consideramos que las creencias meritocráticas hacen referencias tan sólo a una de las atribuciones causales del paso de unas posiciones sociales a otras.

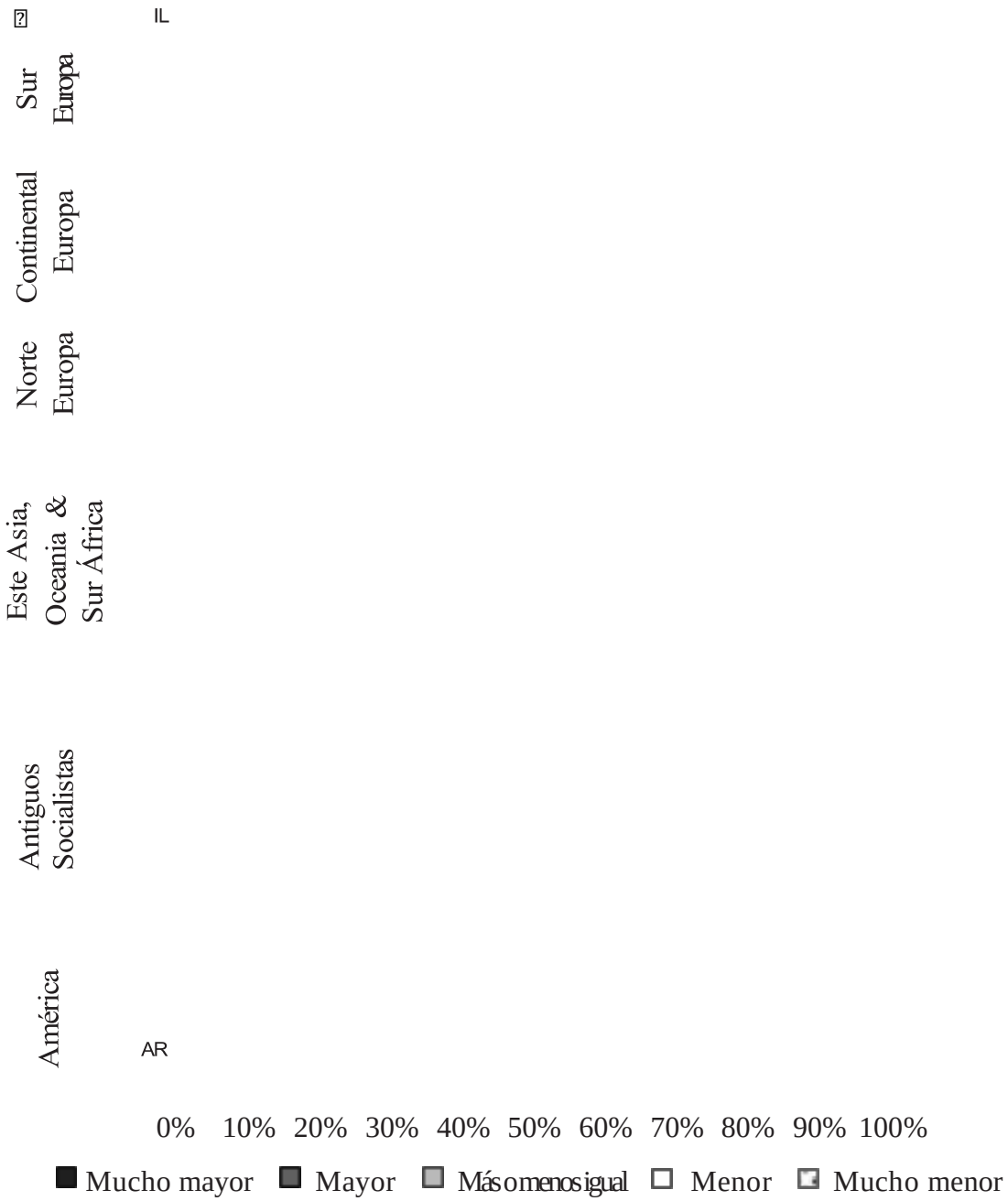
2.3 Relación entre la movilidad objetiva y las creencias en la movilidad social

Una de las consecuencias de la inmovilidad social es que la pobreza afecta siempre al mismo grupo de personas (Liliana & Macías, 2019). En 2018, la Organización para la Cooperación y el Desarrollo Económicos (OCDE) sacó un informe titulado: *A Broken Social Elevator? How to promote social mobility*, en el que presentaba algunos indicadores sobre movilidad social objetiva para los países de la OCDE. En el caso de España, el 65,7% de las personas perteneciente al quintil más pobre de la población española permanecerán en el mismo quintil en los siguientes 4 años. Estos resultados van en línea con el planteamiento de Corak (2013), quien muestra que existe un importante factor hereditario en los ingresos económicos. De hecho, en España los ingresos de los padres son un buen predictor (r = 0.40) de los ingresos de los hijos (Corak, 2013). Del mismo modo, las familias de las posiciones sociales más altas —en comparación con las más bajas— pueden trasmitir a sus descendientes importantes beneficios que afecten a los niveles de movilidad de las posiciones más altas a las más bajas, por ejemplo: grandes herencias económicas (Korom, 2016; Fessler & Schürz, 2018), o un gran capital social y cultural (Bourdieu, 1987).

En este sentido, un estudio llevado a cabo en Italia, en el que se compararon los apellidos en Florencia en 1427 (siglo XV) y 2011, encontraron que la probabilidad de conseguir una ocupación de élite (abogados, banqueros, médicos y farmacéuticos, y joyero) es más alta cuantos más antepasados llevaron a cabo la misma ocupación (Baroni & Mocetti, 2015). En concreto, encontraron que la familia Bernardi (situada en el percentil 90 de la distribución de la renta) se situaba notablemente más arriba que la familia Grasso (percentil 10) en la estructura social de la Florencia del siglo XV. Seis siglos y 20 generaciones más tarde siguen existiendo diferencias significativas entre las rentas de los descendientes de las familias Benardi y Grasso.

Esta inmovilidad en la parte más alta y en la más baja puede provocar que la desigualdad entre las personas que más y menos tienen perdure a lo largo de varias generaciones (OCDE, 2018). Una sociedad en la que las personas que están más bajo en la escala social heredan sistemáticamente la posición social puede derivar en una sociedad segregada y polarizada, lo cual se relaciona con más inestabilidad política (Mijs, 2021; Piketty, 2020).

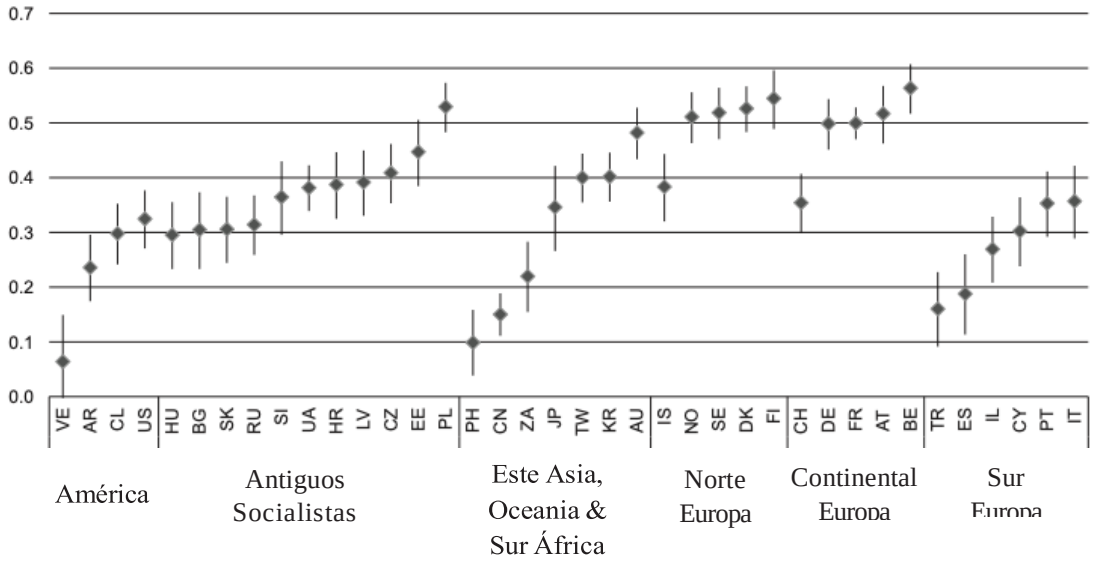
Figura 3. Creencias en la movilidad social experienciada intergeneracional (porcentajes) (ISSP, 2009)



Nota: Figura sacada y traducida de Meraviglia (2017); Iniciales de los países en inglés

En relación a las creencias en la movilidad social, la Figura 3 muestra que en España (2009) aproximadamente un 45% dijo tener una condición de vida mucho más alta o más alta que su padre cuando tenía su edad, un 40% aproximadamente la misma condición, y un 15% aproximadamente una condición menor o mucho menor. En líneas generales, aunque existen diferencias entre las creencias en la movilidad social entre países, la mayoría de los países que componen la base de datos de ISSP (2009) presentan porcentajes de creencias en la movilidad social. Esto es, en la mayoría de los países, entorno a un 30-50% aprox. de los participantes dijo tener una condición de vida más alta o mucho más alta que su padre cuando tenía su edad, entre un 40-30% aprox. la misma condición, y entre un 15-30% aprox. una condición menor o mucho menor.

Figura 4. Asociación entre la movilidad social objetiva y las creencias en la movilidad social por país (ISSP, 2009; z-transformación de los coeficientes de correlación de Spearman con intervalos de confianza del 95%)



Nota: Figura sacada y traducida de Meraviglia (2017); Iniciales de los países en inglés

La relación entre la movilidad social objetiva y las creencias en la movilidad social presentan asociaciones positivas, y parece diferir entre países (ver Figura 4). Sin embargo, al igual que sucede con diferentes constructos previamente mencionados, tales como el estatus socioeconómico subjetivo (Adler et al., 2000; Singh-Manoux et al., 2003) y la desigualdad económica subjetiva (Castillo et al., 2022; Schmalor & Heine, 2022; Willis et al., 2022), las creencias en la movilidad social tienen consecuencias importantes más allá de sus contrapartidas objetivas. Por ejemplo, las creencias en la movilidad social —en comparación con la objetiva— parecen presentar un efecto más fuerte sobre varias actitudes políticas y económicas (Turner, 1992). Un estudio llevado a cabo por Gugushvili (2016) utilizando datos de la *European Values Studies* (2010) y de la *Life in Transition Survey* (2010) encontró que, las creencias en la movilidad social experienciada tienen un mayor efecto sobre las actitudes hacia las diferencias de ingresos que la movilidad social objetiva experienciada. Además, el autor mostró que mientras que las creencias en la movilidad social experienciada descendente se relacionaban negativamente con las actitudes hacia las diferencias de ingresos, las creencias en la movilidad social experienciada ascendente lo hacían positivamente. En la misma línea, Präg y Gugushvili (2021) llevaron a cabo un estudio correlacional en Alemania con 2.827 participantes donde encontraron que las creencias en la movilidad social se asociaban con diferentes indicadores de salud (como la satisfacción con la vida y la soledad), independientemente de la movilidad objetiva.

En el contexto estadounidense las personas tienden a sobrestimar su movilidad experimentada (e.g., Duru-Bellat & Kieffer, 2008) y futura (Kraus & Tan, 2015), y creen en el "sueño americano" en mayor medida para sí mismas que para otras personas o para su sociedad (Hanson & Zogby, 2010). Asimismo, cuando a las personas se les presentan tasas de movilidad reales, las creencias cambian, pero lo hacen con más fuerza para las

creencias en la movilidad societal que para las creencias en la movilidad personal (Shariff et al., 2016).

Las creencias en la movilidad social no se corresponden necesariamente con la movilidad social objetiva en la estructura social, aunque es frecuente encontrar una asociación entre ambas variables (Berger & Engzell, 2020; Fischer, 2009; Gugushvili, 2021; Kelley & Kelley, 2009). Por ejemplo, una encuesta realizada en Francia con muestra representativa mostró que, en términos de movilidad ocupacional, un 60% de los hombres estaba en la misma situación que su padre cuando tenía su misma edad; sin embargo, tan sólo alrededor de un 25% percibía dicha inmovilidad (INSEE, 2003).

Diversos estudios sugieren que es difícil para las personas estimar con precisión la movilidad social real (Alesina et al., 2018; Duru-Bellat & Kieffer, 2008; Jaime- Castillo & Marqués-Perales, 2014). Mientras que algunas personas sobreestiman la movilidad social (Cheng & Wen, 2019; Davidai & Gilovich, 2015a; Kraus & Tan, 2015), otras tienden a subestimarla (Alesina et al., 2018). Estos sesgos cognitivos, también se han encontrado en otras percepciones sociales, como la percepción de la desigualdad económica (Eriksson & Simpson, 2012; Hadavand, 2018; Trump, 2018). Esta discrepancia entre las creencias en la movilidad social (i.e., las creencias o percepciones sobre el cambio en el estatus socioeconómico de una persona o grupo a lo largo del tiempo) y la objetiva (i.e., el cambio en el estatus socioeconómico de una persona o grupo a lo largo del tiempo real) varía entre países. En Estados Unidos las personas tienden a sobreestimar la movilidad social real (Cheng & Wen, 2019; Davidai & Gilovich, 2015a; Kraus & Tan, 2015; para una excepción véase Chambers et al., 2015); en Europa (por ejemplo, en Reino Unido, Francia, Italia y Suecia), por el contrario, las personas tienden a subestimarla (Alesina et al., 2018; para una excepción véase Jaime-Castillo & Marqués-Perales, 2014).

Estos sesgos cognitivos tienen consecuencias importantes tanto para los individuos como para la sociedad en general (Alesina & La Ferrara, 2005; Cruces et al., 2013; Karadja et al., 2017; Präg & Gugushvili, 2021). Estudios previos sugieren que las personas podrían estar sesgadas hacia las creencias en la movilidad social ascendente. En concreto, las personas tienden a describir en mayor medida la movilidad social como algo que implica únicamente movilidad ascendente, y no tanto movilidad descendente (Mandisodza et al., 2006). Del mismo modo, Davidai y Gilovich (2015b) descubrieron que las personas, al evaluar la probabilidad de moverse en una clasificación, tienden a percibir la movilidad ascendente como más probable que la descendente. Este sesgo optimista también se aprecia al estimar la movilidad social personal. Independientemente de si habían mejorado (movilidad ascendente) o empeorado (movilidad descendente) su posición social en el pasado, las personas creen que mejorarán su posición social en el futuro (Du et al., 2021; Kelley & Kelley, 2009).

Capítulo 3

Correlatos de las Creencias en la Movilidad Social

Siguiendo la tradición psicosocial, el presente trabajo utiliza las percepciones y creencias para abordar el estudio de la movilidad social, así como sus consecuencias psicosociales. Por tanto, en los siguientes puntos se tratará la relación entre las creencias en movilidad social y diferentes variables.

3.1 Características sociodemográficas y socioeconómicas

Investigaciones previas sugieren que las características sociodemográficas y socioeconómicas de las personas, tales como su edad, sexo, o estatus socioeconómico objetivo y subjetivo, son importantes predictoras de las creencias en la movilidad social intergeneracional (Duru-Bellat & Kieffer, 2008; Kelley & Kelley, 2009).

Así, diferentes investigaciones han encontrado una relación negativa entre las creencias en la movilidad social y la edad (para EEUU, Kraus & Tan, 2015; Cheng & Wen, 2019). En concreto, las personas de menor edad tienden a percibir que en su sociedad es fácil moverse hacia mejores posiciones sociales —movilidad ascendente—. En relación a las creencias en la movilidad social y el sexo, un estudio llevado a cabo en 30 países (Kelley & Kelley, 2009) mostró que las mujeres —en comparación con los hombres— tienden a percibir menos probabilidades de ascender a mejores posiciones sociales que su familia de origen. Además, diferentes variables contextuales parecen moderar la relación entre las creencias en la movilidad social y el sexo. Por ejemplo, un aumento del PIB nacional aumenta de manera significativa las creencias en la movilidad social ascendente en hombres, pero no en mujeres. Por último, la relación entre el estatus socioeconómico objetivo y las creencias en la movilidad social no está del todo clara en la literatura. Algunos autores no encuentran relaciones significativas entre diferentes indicadores objetivos del estatus socioeconómico, como nivel de estudios (Browman et

al., 2021; Kraus & Kelner, 2013) e ingresos (Browman et al., 2021) con las creencias de movilidad. Sin embargo, otros autores si encuentran relaciones positivas significativas en el caso de los ingresos (Davidai & Gilovich, 2015a). A diferencia de la relación con el estatus socioeconómico objetivo, investigaciones previas sugieren que existe una relación positiva entre las creencias en la movilidad social y el estatus socioeconómico subjetivo (Browman et al., 2021; Kraus & Keltner, 2013; Kraus & Tan, 2015). En concreto, las personas con mayor estatus socioeconómico subjetivo creen más fuertemente que pueden ascender a mejores posiciones sociales, que las personas con menor estatus socioeconómico subjetivo.

Por otro lado, se ha encontrado una relación positiva entre las creencias en la movilidad social y la orientación política. Cuanto más se ubican las personas hacia la derecha en el espectro político, más creen en la movilidad ascendente (Alesina et al., 2018; Chambers et al., 2015; Davidai, 2018; Davidai & Gilovich, 2018). Además, se ha encontrado que las personas de derechas —en comparación con las de izquierdas— tienden a sobrestimar el nivel de movilidad ascendente existen en la sociedad, mientras que las personas de izquierdas —en comparación con las de derecha— tienden a sobrestimar el nivel de movilidad descendente (Davidai & Gilovich, 2015a; Kraus & Tan, 2015).

3.2 Desigualdad económica

La desigualdad económica y la movilidad social podrían entenderse como diferentes aspectos (o dimensiones) de la estructura social, aunque relacionados. La primera, referida a la distribución asimétrica de los recursos entre los diferentes estratos sociales; la segunda, a la movilidad de los individuos a través de los diferentes estratos sociales. Investigaciones previas han encontrado que la desigualdad económica (objetiva

y subjetiva) se relaciona negativamente con las creencias en la movilidad social (Browman et al., 2021; Davidai, 2018). En otras palabras, en las sociedades con más desigualdad —en comparación con las menos desiguales— las personas tienden a percibir mayor dificultad para moverse de unas posiciones sociales a otras, y por consiguiente a percibir que es más probable que las personas permanezcan en sus posiciones económicas actuales. Por ejemplo, en un estudio realizado en Estados Unidos, Browman et al. (2021) descubrieron que un aumento de la desigualdad percibida disminuía las creencias en la movilidad social ascendente de los individuos más pobres y la movilidad descendente de los individuos más ricos. En la misma línea, Davidai (2018), en una serie de estudios experimentales, en los que manipuló la desigualdad económica percibida, encontró que las personas en la condición de alta desigualdad económica (en comparación con la condición de desigualdad económica baja) percibían que una persona nacida al azar en el quintil más pobre tenía más probabilidades de permanecer en el mismo quintil.

3.3 Preocupación por el estatus socioeconómico

Riesgo económico percibido

Como ya ha sido descrito en detalle en los apartados previos, los individuos de los estratos sociales que componen una estructura social de clases se diferencian entre sí en base a diferentes niveles de acceso a bienes materiales y de servicios (Antonoplis, 2023; Kraus & Stephens, 2012; Manstead, 2018). Así pues, podemos inferir que existen una serie de riesgos evidentes que amenazan a quienes descienden en la escala social, o creen que descenderán en el futuro. Entre estos riesgos estaría la pérdida de recursos financieros para pagar necesidades como ropa, alimentos y vivienda; acceso a servicios sanitarios; vivienda, etc. Por ello, parece evidente que las creencias en la movilidad social

descendente tengan una relación positiva con el *riesgo económico percibido* (i.e., la creencia sobre un posible daño o la posibilidad de una pérdida económica; Darker, 2013).

Además, la literatura existente ha corroborado que la exposición a riesgos derivados de diversas formas de desafíos económicos estimula la demanda individual de la expansión del gasto social, incluso entre los más acomodados (Anderson & Pontusson, 2007; Margalit, 2011; Rehm, 2009; Rehm et al., 2012). Hacker et al. (2013), por ejemplo, descubrieron que los estadounidenses preocupados por la pérdida de ingresos eran más propensos a apoyar políticas que amortiguaran estos riesgos que aquellos que no se preocupaban. A partir de estas evidencias, es posible que el riesgo económico personal percibido medie en la relación entre las creencias de movilidad social descendente y las actitudes hacia la redistribución.

Ansiedad por el estatus

El deseo de conseguir estar en posiciones sociales más altas se ha convertido en una preocupación constante en las sociedades contemporáneas (De Botton, 2004; Wilkinson & Pickett, 2017), provocando niveles de estrés y ansiedad en las personas (Gruenewald et al., 2006). Esta preocupación constante de las personas por su estatus socioeconómico ha sido denominado *ansiedad por el estatus* (De Botton, 2004; Keshabyan & Day, 2020; Marmot, 2009; Scheepers et al., 2009).

Investigaciones recientes han puesto de manifiesto cómo las creencias en la movilidad social (ascendente y descendente) afectan a la ansiedad por el estatus (Melita, Rodríguez-Bailón et al., 2023). En concreto, la relación entre la anticipación de la futura pérdida o no consecución del estatus socioeconómico y los niveles de ansiedad. Las personas que creen que su posición social puede empeorar (frente a mejorar) en el futuro muestran un menor control percibido sobre sus vidas (Fritsche & Jugert, 2017). En este sentido, las personas que perciben una alta movilidad descendente podrían creer que

pueden perder su posición en la escala social, lo cual aumentaría su ansiedad de estatus. Por el contrario, la percepción de una alta movilidad ascendente podría disminuir la ansiedad de estatus. En otras palabras, las creencias en la movilidad social ascendente implicarían la futura consecución de mejores posiciones sociales, con mejores condiciones materiales; por tanto, su anticipación tendría un efecto negativo sobre la ansiedad por el estatus y, consecuentemente, una mejora del bienestar psicológico. Las creencias en la movilidad descendente implicarían la futura pérdida de la actual posición social, perdiendo con ello mejores condiciones materiales; por ello, esto podría provocar un efecto positivo sobre la ansiedad por el estatus (Melita, Rodríguez-Bailón et al., 2023) y una disminución del bienestar psicológico.

3.4 Ideologías y actitudes hacia la desigualdad y la redistribución

Ideología y justificación del sistema

De acuerdo con el resultado de recientes investigaciones, las creencias ideológicas (i.e., desde una perspectiva psicológica, el conjunto de normas y creencias a través de las cuales las personas explican la realidad, proyectan su estado ideal, e intentan conseguirlo, en base a motivaciones individuales y necesidades psicológicas; Jost et al., 2009) pueden desempeñar un papel importante en la legitimación del *statu quo* (e.g., Jost, 2018; Ledgerwood et al., 2011; Mijs, 2021; Napier et al., 2020).

En la mayoría de países occidentales, aun considerando la disminución en las tasas de movilidad social, la mayoría de las personas creen que la jerarquía social es un reflejo de las recompensas meritocráticas al trabajo duro y el esfuerzo (Mijs, 2018). Sin embargo, en un reciente estudio, Mijs (2022) demostró que las personas que creían haber experimentado una movilidad social ascendente eran más propensas a atribuir el éxito

económico a causas meritocráticas. De estos resultados puede inferirse como las creencias en la movilidad social pueden estar relacionadas con las creencias meritocráticas.

En la misma línea, investigaciones previas han encontrado que las creencias en la movilidad social presentan correlaciones moderadas (r = .49) con el apoyo al sistema económico (Mandisodza et al., 2006). Además, a través de una serie de estudios experimentales, Day y Fiske (2016) encontraron relaciones positivas entre las creencias en la movilidad social y diferentes variables legitimadoras del sistema (e.g., justificación del sistema, creencias meritocráticas). Es decir, cuando las personas creen que se encuentran en una estructura social donde es fácil moverse hacía mejores posiciones sociales, tienden a legitimar en mayor medida el sistema. En consonancia con estos resultados, podría esperarse que cuando las personas creen que pueden ascender en la escalera social legitimen en mayor medida el sistema económico. Por el contrario, cuando las personas creen que pueden descender en la escalera social legitiman en menor medida el sistema económico.

Actitudes hacia la desigualdad y la redistribución

Investigaciones previas han señalado que las creencias en la movilidad social podrían estar relacionadas con las *actitudes de las personas sobre la desigualdad económica* (Benabou & Ok, 2001; Kluegel & Smith, 1986; Piketty, 1995). Así, Shariff et al. (2016) encontraron que mientras que la movilidad intergeneracional predice las actitudes hacia la desigualdad, la movilidad intrageneracional predice las atribuciones de éxito y fracaso económico. En conjunto, los resultados de estos estudios podrían sugerir que las personas podrían tolerar niveles más altos de desigualdad cuando piensan que el sistema les favorece, es decir, cuando creen que pueden llegar a conseguir un estatus socioeconómico más alto. Por el contrario, cuando las personas creen que pueden perder su estatus socioeconómico podrían tolerar menores niveles de desigualdad. Esto podría

deberse a que cuando las personas piensan que el futuro les será favorable —en términos de movilidad— podría activar un proceso de racionalización de merecimiento de las diferencias entre las condiciones materiales y el acceso a los servicios de las clases sociales; y, por consiguiente, a mayor incremento de la racionalización, mayor apoyo al *statu quo* y mayor tolerancia de la desigualdad (Day & Fiske, 2019).

Las políticas redistributivas, como la aplicación de medidas fiscales altamente progresivas, son reconocidas como una de las vías más eficaces para reducir la desigualdad económica (Alvaredo et al., 2018; Atkinson, 2015; Piketty, 2015, 2020, 2021; Stiglitz, 2015) y sus consecuencias aversivas personales, interpersonales y sociales (Castillo et al., 2022; Sánchez-Rodríguez et al., 2019; Sommet et al., 2018; Sprong et al., 2019; Therborn, 2017; Wilkinson & Pickett, 2009, 2017; Willis et al., 2022). Las *actitudes hacia la redistribución* pueden entenderse como el apoyo o la oposición a los programas de gasto social destinados a reducir la brecha entre los más acomodados y los menos favorecidos (Luebker, 2014). Según los modelos de economía política, el apoyo a la redistribución es una decisión racional basada en el interés propio (Kim & Lee, 2018; Meltzer & Richard, 1981). Sin embargo, el hecho de que las personas apoyen o no las políticas redistributivas puede verse afectado por una serie de factores distintos del interés propio (Corneo & Grüner, 2002; Fong, 2001). Por ejemplo, el apoyo a la redistribución puede verse afectado negativamente por el estatus socioeconómico subjetivo, más que por el objetivo (Brown-Iannuzzi et al., 2015), o por la ideología política (Alesina et al., 2012; Ballard-Rosa et al., 2017; García-Sánchez et al., 2020; Rodríguez-Bailón et al., 2017).

Mérola y Helgason (2016), usando un diseño experimental, encontraron que mientras la experiencia de la movilidad ascendente absoluta aumentaba el apoyo a la redistribución (e.g., a pagar más impuestos), la movilidad ascendente relativa lo

disminuía. Sin embargo, un reciente estudio llevado a cabo por García-Muniesa (2019) ha demostrado que los efectos de la experiencia de las personas sobre las preferencias por la redistribución pueden ser limitados. El autor descubrió que, aunque los individuos que habían experimentado una movilidad social descendente durante la Gran Recesión de 2008 eran más propensos a apoyar la progresividad fiscal, la correlación no era homogénea entre todos los ciudadanos. En concreto, los ciudadanos que habían experimentado una movilidad social descendente, pero esperaban que su situación económica mejorara en un futuro próximo, no mostraron un mayor apoyo a la progresividad fiscal. Estos resultados sugieren que la mera creencia en la existencia de probabilidades de ascenso —movilidad ascendente— puede ser una fuerza poderosa para explicar por qué las personas que se encuentran en el nivel socioeconómico bajo o medio podrían no aceptar las políticas de redistribución (Kluegel & Smith 1986; Shepelak, 1989).

En consonancia con lo anterior, varias investigaciones han señalado que, las diferencias en las creencias en la movilidad social son importantes predictores del apoyo (o no) de las personas a las políticas redistributivas (Alesina & La Ferrara, 2005; Alesina et al., 2018; Benabou & Ok, 2001; Piketty, 1995). En esta línea, otras investigaciones han sugerido que las expectativas basadas en la creencia de la existencia de oportunidades de ascenso —movilidad ascendente— pueden ser suficientes para presentar actitudes negativas hacia la redistribución (Kluegel & Smith, 1986; Shepelak, 1989).

Capítulo 4

Planteamiento General: Preguntas de Investigación y Objetivos

Como ha sido expuesto en los primeros capítulos, la revisión de la literatura subraya la importancia de estudiar las creencias en la movilidad social. Así, el objetivo principal de esta tesis doctoral es estudiar las creencias en la movilidad social y algunas de sus consecuencias psicosociales. Con este propósito se formulan diversas preguntas de investigación (ver Tabla 4.1).

Desde la psicología social se ha puesto de manifiesto cómo la realidad subjetiva de las personas (frente a la objetiva) puede presentar un rol importante en el comportamiento humano (Asch, 1952; Davidai et al., 2012). Las investigaciones previas se han centrado principalmente en el estudio de la movilidad social a partir de su operacionalización objetiva (Chetty et al., 2017; Corak, 2013, 2016; Marqués-Perales & Fachelli, 2021; Piketty, 1995). De manera complementaria, recientes estudios en psicología social, han comenzado a interesarse en la movilidad social utilizando una operacionalización subjetiva (Browman et al., 2021; Davidai & Gilovich, 2015a; Day & Fiske, 2016; Kraus & Tan, 2015; Wang et al., 2022).

Estudios previos han mostrado que existen diferencias entre las condiciones materiales y cómo éstas son percibidas (Eriksson & Simpson, 2012; Hadavand, 2018; Trump, 2018). De este modo, algunos estudios señalan que la manera en la que las personas perciben la movilidad social (i.e., movilidad subjetiva) no suele coincidir con la movilidad social real (i.e., movilidad objetiva; Berger & Engzell, 2020; Gugushvili, 2016; Kelley & Kelley, 2009). Más concretamente, investigaciones previas señalan que las personas suelen tener problemas para estimar con exactitud la movilidad social real (Alesina et al., 2018; Duru-Bellat & Kieffer, 2008; Jaime-Castillo & Marqués-Perales, 2014). La literatura sugiere la existencia de factores culturales que podrían estar relacionados con una sobrestimación (visión optimista) o subestimación (visión pesimista) de la movilidad social. Por ejemplo, en Estados Unidos, las personas tienden

a sobreestimar la movilidad social (Cheng & Wen, 2019; Davidai & Gilovich, 2015a; Kraus & Tan, 2015; para una excepción véase Chambers et al., 2015); en Europa (por ejemplo, en Reino Unido, Francia, Italia y Suecia), por el contrario, las personas tienden a subestimarla (Alesina et al., 2018; para una excepción véase Jaime-Castillo & Marqués-Perales, 2014).

En la literatura abordada en los primeros capítulo también se mencionan las diferentes aproximaciones en relación con el estudio de las creencias en la movilidad social, que varían (Davidai & Wienk, 2021; Day & Fiske, 2019): 1) Según el tipo de movilidad (absoluta y relativa); 2) Según la trayectoria de la movilidad (ascendente y descendente); 3) Según el target de comparación (personal y societal); 4) Según el tiempo de la movilidad (intrageneracional e intergeneracional; pasado y futuro).

Con la intención de abordar la discrepancia entre la movilidad social objetiva y las creencias en la movilidad social, diseñamos una primera serie de estudios (Capítulo 5). En primer lugar, nos preguntamos: ¿se corresponden las creencias en la movilidad social de las personas en España con la movilidad social real? (PI1). Con el objetivo de dar respuesta a esta pregunta, en el Estudio 1 propusimos como objetivo específico: *determinar en qué medida las personas en España perciben con exactitud la movilidad social real (OE1)*. Una vez abordada la pregunta, llevamos a cabo un segundo estudio en el que nos preguntamos: ¿existen diferencias entre las creencias en la movilidad personal y societal? (P2). Del mismo modo, para responder a nuestra pregunta de investigación nos plantemos el objetivo específico de *examinar si existen diferencias entre las creencias en la movilidad personal y societal (OE2)*. Después de investigar si existen discrepancias entre la movilidad social real y las creencias en la movilidad social en España, y si la discrepancia depende del tipo de movilidad social, nos preguntamos: ¿afectan las creencias meritocráticas a las creencias en la movilidad social? (P3). Para

responder a nuestra tercera pregunta de investigación, planteamos el siguiente objetivo específico: *estudiar si las creencias meritocráticas afectan a las creencias en la movilidad personal y societal (OE3).*

A lo largo de la literatura, se han utilizado diferentes instrumentos para medir los diferentes tipos de movilidad social (e.g., Alesina et al., 2018; Browman et al., 2017; Davidai & Gilovich, 2015a; Gimpelson & Monusova, 2014; Kraus & Tan, 2015; Mijs et al., 2022; Yuan & Li, 2019). Estas medidas, aunque son contribuciones metodológicas importantes al estudio de las creencias en la movilidad social, tienen importantes limitaciones metodológicas (e.g., sesgos perceptivos, dificultad para contestarlas), y teóricas (i.e., no contemplan las diferentes aproximaciones teóricas al estudio de la movilidad, por ejemplo: movilidad ascendente vs. descendente).

Con el objetivo de aportar un instrumento de medición con evidencias de validez, facilidad de implementación, y con capacidad para discriminar entre los efectos de las dos trayectorias de movilidad: ascendente y descendente, se diseñó una segunda serie de estudios (Capítulo 6). En dos estudios, intentamos contestar a la siguiente pregunta de investigación: ¿pueden considerarse constructos independientes las creencias en la movilidad social ascendente y descendentes? (P4) Para contestar a esta pregunta de investigación nos planteamos *diseñar un instrumento que permitiera discriminar entre las creencias en la movilidad social ascendente y descendente (OE4).*

En los primeros capítulos también hemos expuesto que las creencias en la movilidad social están relacionadas con diferentes características sociodemográficas y socioeconómicas de las personas, por ejemplo: edad, sexo, estatus socioeconómico objetivo y subjetivo, y orientación política (Alesina et al., 2018; Davidai, 2018; Davidai & Gilovich, 2018; Duru-Bellat & Kieffer, 2008; Kelley & Kelley, 2009). Por otro lado, las creencias en la movilidad social parecen tener importantes consecuencias en la salud

y el bienestar de las personas (Gugushvili & Präg, 2021; Gugushvili et al., 2022; Melita, Rodríguez-Bailón et al., 2023). Es decir, la manera en que las personas perciben la movilidad en la estructura social parece influir en su salud y bienestar. También, las creencias en la movilidad social han mostrado un papel importante a la hora de entender el mantenimiento de la desigualdad económica. En este sentido, se han relacionado con creencias ideológicas legitimadoras del sistema (Day & Fiske, 2016; Mandisodza et al., 2006; Mijs, 2022), y con la tolerancia hacia la desigualdad (Benabou & Ok, 2001; Kluegel & Smith, 1986; Piketty, 1995) y hacia la redistribución de riqueza (Alesina & La Ferrara, 2005; Alesina et al., 2018; Benabou & Ok, 2001; Piketty, 1995).

Con el fin de estudiar los diferentes efectos de las creencias en la movilidad social ascendente y descendente fue planteada una tercera serie de estudios (Capítulo 7). En esta serie de estudios (Estudios 1-3) nos preguntamos si: ¿afectan de la misma manera las creencias en la movilidad social ascendente y descendente a las actitudes hacia la redistribución? (P5) Para responder a esta pregunta plateamos el siguiente objetivo específico: *analizar el efecto de la movilidad social ascendente y descendente sobre las actitudes hacia la redistribución (OE5).*

Cuando las personas experimentan movilidad social ascendente (Mijs, 2022), y cuando perciben un nivel moderado (vs. bajo vs. control) de movilidad societal (Day & Fiske, 2017), tienden a atribuir el éxito económico a causas meritocráticas. También, se ha encontrado que las personas que respaldan las creencias meritocráticas suelen oponerse a las políticas redistributivas (García-Sánchez et al., 2020). Por el contrario, las personas que se enfrenten al posible descenso en la escala social se encuentran amenazadas por una serie de riesgos evidentes (e.g., pagar facturas, vivienda, alimentos, ropa, etc.). La literatura ha corroborado que cuando las personas se exponen a amenazas económicas tienden a apoyar en mayor medida una expansión del gasto social y la

provisión pública de bienestar (Anderson & Pontusson, 2007; Hacker et al., 2013; Margalit, 2011; Rehm, 2009; Rehm et al., 2012).

A partir de estas evidencias, nos preguntamos: ¿qué mecanismos pueden explicar el efecto de las creencias en la movilidad social ascendente y descendente sobre las actitudes hacia la redistribución? (P6), y, para dar respuesta a la pregunta, planteamos los siguientes objetivos específicos: *Examinar si las creencias meritocráticas median el efecto de las creencias en la movilidad social ascendente sobre las actitudes hacia la redistribución (OE 6.1); Examinar si el riesgo económico percibido media el efecto de las creencias en la movilidad social descendente sobre las actitudes hacia la redistribución (OE 6.2).* Para llevar a cabo los objetivos de la tercera serie de estudios (OE 5, 6.1 y 6.2) planteamos tres estudios (uno de tipo transversal y dos experimentales) en dos países diferentes, Italia y España, dos países con una cultura, un índice de Gini y una situación económica similares (Organización para la Cooperación y el Desarrollo Económico, 2022). Sin embargo, ambos países presentan diferencias en lo que se refiere a las políticas redistributivas. Aunque en ambos países el grupo más rico recibe más transferencias públicas que el grupo más pobre, esta diferencia es mayor en el contexto italiano (Organización para la Cooperación y el Desarrollo Económico, 2022). Por lo tanto, poder comprobar los modelos en las muestras italianas y española nos proporcionó la oportunidad de explorar el apoyo a las políticas redistributivas en dos contextos diferentes en lo que concierne a las políticas redistributivas.

Los capítulos empíricos de la tesis son artículos empíricos independientes, por ello, presentarán una introducción y discusión general propios. Como consecuencia, los argumentos expuestos pueden llegar a repetirse. La enumeración de las tablas y figuras seguirán el orden del capítulo al que pertenecen. El capítulo de discusión general y conclusiones (Capítulo 8) recoge los resultados de la presente tesis doctoral, así como una

breve conclusión en inglés. También, se incluye un capítulo con el material suplementario de los diferentes capítulos empíricos. Finalmente, de manera adicional se incluye el material suplementario de los capítulos empíricos y las referencias bibliográficas usadas en la presente tesis doctoral.

Con el fin de cumplir los requisitos para la obtención de la mención de doctorado internacional, los capítulos empíricos y el subapartado de conclusiones (Capítulo 8) se presentan en inglés.

Tabla 4.1.
Resumen de las preguntas de investigación y de los objetivos de la tesis doctoral

Objetivo General: Estudiar las creencias en la movilidad social y algunas de sus consecuencias psicosociales

Preguntas de Investigación (PI)	Objetivos Específicos (OE)	Capítulo (Estudio)
1. ¿Se corresponden las creencias en la movilidad social de las personas en España con la movilidad social real?	1. Determinar en qué medida las personas en España perciben con exactitud la movilidad social real	Capítulo 5 (Estudio 1)
2. ¿Existen diferencias entre las creencias en la movilidad personal y societal?	2. Examinar si existen diferencias en la intensidad de las creencias en la movilidad personal y societal	Capítulo 5 (Estudio 2)
3. ¿Afectan las creencias meritocráticas a las creencias en la movilidad social?	3. Estudiar si las creencias meritocráticas afectan a las creencias en la movilidad personal y societal	Capítulo 5 (Estudio 2)
4. ¿Pueden considerarse constructos independientes las creencias en la movilidad social ascendente y descendente?	4. Diseñar un instrumento que permita discriminar entre las creencias en la movilidad ascendente y descendente	Capítulo 6 (Estudio 1 y 2)
5. ¿Afectan de igual modo las creencias en la movilidad social ascendente y descendente a las actitudes hacia la redistribución de las personas?	5. Analizar el efecto de la movilidad social ascendente y descendente sobre las actitudes hacia la redistribución	Capítulo 7 (Estudio 1, 2 y 3)
6. ¿Qué mecanismos pueden explicar el efecto de las creencias en la movilidad social ascendente y descendente sobre las actitudes hacia la redistribución?	6.1. Examinar si las creencias meritocráticas median el efecto de las creencias en la movilidad social ascendente sobre las actitudes hacia la redistribución; 6.2. Examinar si el riesgo económico percibido media el efecto de las creencias en la movilidad social descendente sobre las actitudes hacia la redistribución	Capítulo 7 (Estudio 1, 2 y 3)

CAPÍTULOS EMPÍRICOS

EMPIRICAL CHAPTERS

Chapter 5

(Mis)perception in Social Mobility: Optimistic Bias for Personal (but not Societal) Mobility Beliefs

(Mis)perception in Social Mobility: Optimistic Bias for Personal (but not Societal) Mobility Beliefs

Juan Matamoros-Lima[1], Guillermo B. Willis[1], Ginés Navarro-Carrillo[2], and Miguel Moya[1]

[1]Mind, Brain and Behavior Research Center (CIMCYC), Department of Social Psychology, Faculty of Psychology, University of Granada, Granada, Spain

[2]Department of Psychology, Faculty of Humanities and Educational Sciences, University of Jaén, Jaén, Spain

Abstract

Cognitive biases affect how people perceive social class mobility. Previous studies suggest that people find it difficult to estimate actual economic social mobility accurately. These results have also noted differences between regions. While in the United States people overestimate actual economic social mobility, in Europe people tend to underestimate it. Across two independent cross-sectional studies, we examined whether cognitive biases operate in the Spanish context and, if so, whether they depend on the type of social mobility. In Study 1 (N = 480), we tested whether people in Spain have an accurate estimation of actual upward economic societal mobility. The results showed that people in Spain have a pessimistic view of upward societal mobility. In Study 2 (N = 274), we analyzed whether people in Spain are more or less optimistic according to the type of social mobility: personal vs. societal. We found that Spaniards are more optimistic when estimating their own mobility (i.e., personal mobility) than when estimating the mobility of the Spanish society (i.e., societal mobility). Contrary to our predictions, we found that meritocratic beliefs do not play a relevant role in determining any type of social mobility. These results extend previous research on social mobility and its psychosocial consequences. Furthermore, they are well aligned with a new psychosocial perspective suggesting that social mobility is a multidimensional construct. We also discussed the psychosocial implications of this optimistic bias for personal mobility.

Keywords: Subjective Social Mobility, Objective Social Mobility, Meritocratic Beliefs, (Mis)perception, Optimistic Bias

Introduction

Cognitive biases affect how people perceive economic reality (Eriksson & Simpson, 2012; Hadavand, 2018; Trump, 2018). This is also true for social mobility (i.e., the change in the socioeconomic status of a person or group over time; Day & Fiske, 2019). Whereas some people tend to overestimate social mobility (Cheng & Wen, 2019; Davidai & Gilovich, 2015a; Kraus & Tan, 2015), others tend to underestimate it (Alesina et al., 2018). This research aimed to ascertain whether cognitive biases operate in the Spanish context and, if so, whether they depend on the type of social mobility beliefs (Davidai & Wienk, 2021): personal (i.e., prospects of own mobility) or societal (i.e., prospects of general mobility); intragenerational (i.e., prospects of mobility during the course of one's life) or intergenerational (i.e., prospects of mobility between generations); upward (prospects of improving subjective status over time) or downward (prospects of getting worse subjective status over time).

Social Mobility (Mis)perception

Subjective (or perceived) reality is important for understanding and explaining human behavior (Asch, 1952; Davidai et al., 2012; Gugushvili, 2016). However, subjective economic reality often does not correspond to objective reality (Gimpelson & Treisman, 2018; Hauser & Norton; 2017; Willis et al., 2022). Indeed, different empirical studies suggest that people find it difficult to accurately estimate actual economic social mobility (Alesina et al., 2018; Duru-Bellat & Kieffer, 2008; for occupational social mobility see Jaime-Castillo & Marqués-Perales, 2014). These results have also highlighted notable differences between regions. While in the United States, people overestimate actual economic social mobility (Cheng & Wen, 2019; Davidai & Gilovich, 2015a; Kraus & Tan, 2015; see also Chambers et al., 2015), in Europe, people (e.g., those

from France, Italy, Sweden, and the United Kingdom) tend to underestimate it (Alesina et al., 2018).

These cognitive biases have important individual and societal consequences (Alesina & La Ferrara, 2005; Cruces et al., 2013; Karadja et al., 2014; Präg & Gugushvili, 2021). For instance, Brown-Iannuzzi et al. (2015) found that experimentally manipulated high subjective social status in laboratory tasks decreased support for redistribution. These findings are consistent with existing research showing that when individuals overestimate their perceived standing in society and are presented with their actual status (which tends to be poorer), they often exhibit a more favorable outlook toward redistribution (Alesina & La Ferrara, 2005; Cruces et al., 2013). Conversely, when people mistakenly underestimate their true standing in society, they tend to be less approving of redistributive policies (Karadja et al., 2014). Therefore, people could overestimate (optimistic view) or underestimate (pessimistic view) their status in society, which, in turn, could lead to unequal support for policies that would promote economic equality.

Importantly, these biases could be shaped by the type of social mobility that is being examined. People may think of mobility in personal terms (*personal mobility*) or general societal terms (*societal mobility*). Although it is plausible that societal mobility beliefs affect personal mobility beliefs (e.g., Day & Fiske, 2017), other variables may also be at play. For example, in the US context, people tend to overestimate their experienced mobility (e.g., Duru-Bellat & Kieffer, 2008) and their future mobility (Kraus & Tan, 2015), as well as to believe in "The American Dream" to a greater extent for themselves than for other people of their society (Hanson & Zogby, 2010). Likewise, when people are presented with actual mobility rates, their mobility beliefs decrease but do so more strongly for societal mobility beliefs than for personal mobility beliefs (Shariff

et al., 2016). Therefore, they may be important differences when estimating *personal mobility* and *societal mobility*.

Bias in Personal vs. Societal Mobility

Previous research has shown that people tend to be optimistic when thinking about their own personal future, believing that their own chances of experiencing a negative event are lower than can possibly be true (Weinstein, 1980). For example, people underestimate the likelihood of getting into an automobile accident (Roberstson, 1977), or being affected by a health problem (McGee & Cairns, 1994; McKenna et al., 1993). Interestingly, although people seem to be optimistic about themselves and their families, they also tend to feel pessimistic about the fate of their fellow citizens and of their nation (Galdi et al., 2020).

These results suggest the existence of an optimistic personal bias (Mezulis et al., 2004; Taylor, 1989), which appears to be consistent across countries (Sharot, 2011), and a pessimistic societal bias (Galdi et al., 2020). For instance, a survey conducted in twenty-seven European countries after the 2008 economic crisis showed that, when respondents were asked whether the economic crisis impacted on their personal situation, only 56% of them gave an affirmative answer. However, 90% or more of the respondents agreed that the economic crisis impacted on the world economy, the European economy, and the national economy (European Commission, 2011). In the same vein, a recent survey in the Spanish context showed that, whereas 66.1% of Spaniards described their economy as very good or good, only 20.4% did so for the country's economy (Sociological Research Centre, 2022).

This optimistic bias is also shown when estimating personal social mobility. Regardless of whether they had improved (upward mobility) or worsened (downward mobility) their social position compared to the past, people believed that they would

improve their social position in the future (Du et al., 2021; Kelley & Kelley, 2009). This social mobility bias may be explained by dispositional optimism; that is, the fact that people tend to view personal future events positively (e.g., getting a good job, salary increase, etc.; Scheier et al., 1994). Another explanation for this cognitive bias may lie in how people perceive their personal accomplishments and those of their peers. Sánchez-Rodriguez et al. (2019) found that income and wealth inequality can promote an individualistic normative climate (see also Sánchez-Rodríguez et al., 2023). In these high inequality contexts, people tend to view society as composed of independent individuals focused on their personal goals. This mindset is conducive to meritocratic attributions, meaning that people believe that getting ahead in life results from their own talent and hard work (Mijs, 2021). These meritocratic attributions about future success can lead to increased optimism about personal mobility in the future as people believe that their own efforts will be rewarded (Mijs et al., 2022).

Briefly, there is strong evidence to support the thesis that people have an optimistic bias when they think about their own future and a pessimistic view when they think about the future of other people or society. However, this approach has not been tested directly in a societal mobility beliefs framework.

Overview of the Current Research

People have difficulties in estimating the actual economic social mobility in their country, and this leads to a biased view of reality. Whereas some people overestimate the existing level of mobility, others underestimate it. Here we will use the term "optimistic" to refer to the overestimation of mobility and "pessimistic" to refer to the underestimation. The overestimation or underestimation of social mobility can be analyzed in several ways. In this paper, we have chosen two of them. The first is by comparing the objective actual economic mobility with the perceived or estimated one. This can only be done logically

concerning the past because people have yet to know about future. The second is by asking people if they think that in the future, they (or their children) will be economically better off (optimism) or worsen off (pessimism).

The overestimation or underestimation of subjective social mobility —compared to economic social mobility— has been tested in different European countries, but not in Spain. Moreover, although past research has shown that people perceive their personal economies more optimistically than their countries' economies (Galdi et al., 2020), little attention has been paid to the fact that people may be more optimistic when estimating their own mobility (personal mobility) than in general (societal mobility).

The main purpose of this work was to determine the extent to which the Spanish population accurately perceives actual economic social mobility. Also, we examined whether there are some differences between personal and societal mobility perceptions. To reach these aims, we conducted two independent cross-sectional studies.

All the analyses were conducted using R software (R Core Team, 2022). Preregistrations, R code to reproduce analyses, and supplementary material are available at https://osf.io/x2p7w/?view_only=cc9dc681996d4d92b3cf82446a5f4cac.

Study 1

This study aims to explore to what extent the perception of upward societal mobility matches actual upward economic societal mobility in Spain; that will allow us also to analyze whether an optimistic (more perceived mobility than actual) or a pessimistic perspective (less perceived mobility than actual) exists.

To compare the reality and the perception of societal mobility in Spain, we compare statistics about actual economic mobility during 18 years with the subjective estimation of mobility in this period.

Method

Participants and Procedure

The sample size was calculated in a prior power analysis using G*Power (Faul et al., 2009) for a one-sample *t-test* (two tailed, α = 0.05, 80% Power, Cohen's *d* = 0.15; Lovakov & Agadullina, 2021), to check the differences among actual upward intergenerational economic societal mobility and upward intergenerational societal mobility beliefs. A minimum of 351 participants was required. The final sample was composed of 480 participants. A sensitivity analysis showed that a sample size of 480 allowed us to achieve a Cohen's $d \geq 0.12$ (alpha level = 0.05, 80% Power).

After granting informed consent, a total of 553 participants were collected. Seventy-three participants were excluded according to the pre-registered exclusion criteria. The final sample included 480 participants, 65% female (33.54% male and 1.46% other), with M_{age} = 24.62 (*SD* = 7.74) and, M_{income} = €1482.86 per month (*SD* = 4980.43). Most of the participants were single (62.71%), had a higher secondary education (99.37%), and students (63.33%) (see Table S1).

All participants were reached online through the university's institutional email. Participants were asked to complete a confidential and anonymous survey which took approximately 20 minutes to be completed. They voluntarily agreed to participate and were informed that they could leave the study at any time. A monetary incentive was provided to participants. The study was conducted after receiving approval from the local Ethics Committee.

Measures[2]

Actual Upward Intergenerational Societal Mobility. The data on intergenerational economic social mobility provided by the Felipe González Foundation in collaboration

[2] In the preregistration plan, we preregistered others measures for exploratory purposes related to different research goals.

with the Cotec Foundation were extracted[3]. We carried out the average intergenerational economic social mobility of people born between 1984-1990, who in 2016 were between 26–32-year-olds. To calculate the percentage of people from the poorest quintile who moved into richer quintiles, we subtracted from the total percentage of people (100%) the number of people who remained in the poorest quintile. Specifically, we obtained an objective indicator of upward intergenerational societal mobility of people belonging in his youth —people between 8-14 years in 1998— to the poorest quintile who moved to richer quintiles when they were between 26-32 years in 2016. Higher scores mean higher actual upward intergenerational economic societal mobility.

Upward Intergenerational Societal Mobility Beliefs. To contrast the actual intergenerational societal mobility, we created an indicator of perceived intergenerational societal mobility using a period of years similar to that of our indicator of actual social mobility (between 26-32 years), comparing the income quintile of origin of a person born in the poorest quintile with the quintile of destination. For this purpose, we used a ladder scale, which has been used to estimate social mobility perception in prior studies (Alesina et al., 2018; Davidai, 2018).

Specifically, perceived upward societal mobility was measured by asking participants about the number of people born in 1988-1994 that have moved from the poorest quintile to richer quintiles in 2020. Afterward, participants were asked to imagine that the Spanish population has been reduced to 100 people, and divided by income quintiles. Then, we presented two social status "ladders", divided by income quintiles,

[3] To calculate the intergenerational social mobility index, the Felipe González Foundation, in collaboration with the Cotec Foundation, extracted household income data in 1998 and 2016 through the Spanish Tax Agency. Using the household identifier, they matched parents with children and filtered out children born between 1984-1990 (between 8 and 14 years old in 1998). From this point they calculated income percentiles for each child in 2016 and their parents in 1998. At this point, we obtain the income percentile to which Spaniards aged 26 to 32 belong in 2016 and that of their household of origin. Using both data, intergenerational social mobility is calculated and the data are shown in income quintiles.

which represent where each person is on the income scale at two different moments: the moment of its birth (1988-1994) and 2020 (the year this study was run). The participants were asked to indicate the number of people in the poorest quintile (born between 1988-1994), assuming that there were 20 people in each quintile, who remain in the poorest quintile and who moved to other richer quintiles, in the current affairs (2020; see Figure S1). As we did for actual social mobility, we calculated the percentage of people who move from the poorest quintile to the richer quintile. Higher scores mean higher upward intergenerational societal mobility beliefs.

Sociodemographic factors. Finally, we asked about age, gender (*male, female, other*), marital status (*single, with partner, married, divorced, widowed)* occupation (*unemployed, student, student and part-time worker, part-time worker, full-time worker, retired*), participant's income (it was calculated by dividing monthly net household income by the number of people living in the household), educational level (from 1 = *no schooling* to 5 = *postgraduate*), and political orientation (1 = *far-left* to 7 = *far-right*).

Results

Preliminary Analysis

Descriptive statistics and Pearson correlations between all variables included in Study 1 are reported in Table S2.

Exploratory Analysis

We examined potential differences between actual upward intergenerational societal mobility and upward intergenerational societal mobility beliefs. The objective data showed that the percentage of people who moved from the poorest quintile to other quintiles was M = 75.2. Participants thought (subjective data) that the percentage of people who moved from the poorest quintile to the richer quintiles was M = 53.57 (SD = 27.59). We run a one-sample *t-test* using *rstatix* package (Kassambara, 2023) to check

whether there were significant differences between participant's perceived and actual social mobility. We found significant differences between actual upward intergenerational societal mobility and upward intergenerational societal mobility beliefs ($t_{(479)}$ = -17.18, p < 0.001, Glass's Δ = 0.78, 95% CI [-1.18, 2.75]).

Discussion

Results from Study 1 suggest that participants from the Spanish population had an inaccurate view of social mobility in Spain. Specifically, the results indicated that the respondents underestimated the probability (pessimistic view) of a person from the poorest quintile reaching richer quintiles (upward intergenerational societal mobility). This finding, which is in line with the existing literature (Alesina et al., 2018), could be due to the perceptual difference between social (more pessimistic) and personal (more optimistic) events (Galdi et al., 2020). That is, it is possible that people are pessimistic when asked about societal mobility, and not so much when asked about their personal mobility. To explore this further, we conducted a conceptual replication of Study 1. Concretely, in Study 2 we investigated whether there are substantial differences between personal and societal mobility.

Study 2

The main goal of this study was to replicate and extend the findings obtained in Study 1. We compared personal and societal mobility beliefs to test whether the pessimistic perception of societal mobility in Spain depends on the type of mobility: personal and societal. In other words, if Spanish population are pessimistic when estimating mobility in Spain (societal mobility)—as it was found in Study 1—but nevertheless they are more optimistic when estimating their own mobility (personal mobility). We also tested whether these differences are affected by the type of time-based mobility; that is, we analyzed is this difference exists in both perceived intragenerational

(i.e., the social mobility of an individual) and intergenerational mobility (i.e., the social mobility of different generations).

Furthermore, to shed light on the role of ideological variables in personal and societal mobility beliefs, we tested the predictive contribution of meritocratic beliefs to personal and societal mobility beliefs while controlling for the influence of the person's level of dispositional optimism.

Our preregistered hypotheses were:

Hypothesis 1: Intragenerational personal mobility beliefs will be higher than intragenerational societal mobility beliefs (i.e., the participants will perceive that in 15 years, they will be better off than other people of the same SES).

Hypothesis 2: Intergenerational personal mobility beliefs will be higher than intergenerational societal mobility beliefs (i.e., the participants will perceive that in 35 years, their children will be better off than the children of other people of the same SES).

Hypothesis 3: Participant's meritocratic beliefs will positively predict: Intragenerational personal mobility beliefs (H3a); Intergenerational personal mobility beliefs (H3b); Intragenerational societal mobility beliefs (H3c); and Intergenerational societal mobility beliefs (H3d).

Method

Participants and Procedure

After granting informed consent, answers from a total of 284 participants were collected. Ten participants were excluded according to the pre-registered exclusion criteria. The final sample (N = 274) consisted of 71.17% female (28.83% male), with M_{age} = 36.57 (SD = 14.63) and, M_{income} = €1482.16 per month (SD = 4980.43). Most of the participants were in a relationship or married (60.22%), had secondary education or higher (95.97%), and were full-time workers (46.72%) (see Table S1).

A sensitivity analysis was performed using the *pwr* package (Champely, 2016) by R software (R CoreTeam, 2022). This analysis suggests that for a paired *t-test* (one tailed, $\alpha = 0.05$, 80% Power) our final sample ($N = 274$) allows detecting an effect size of Cohen's $d \geq 0.15$.

Data collection was reached online through the university's institutional email and different social networks (e.g., Facebook, Twitter, etc.). People voluntarily agreed to participate and were informed that they could leave the study at any time. In the end, participants were fully debriefed and thanked. The study was conducted after receiving approval from the local Ethics Committee.

Measures

Personal Mobility Beliefs. Participants' subjective socioeconomic status was measured using the MacArthur SSS scale (Adler et al., 2000). It comprises 10 rungs ranging from 1 (*worse off status*) to 10 (*better off status*). Participants answered the scale three times: 1) at the present; 2) thinking about the position on the scale in the next 15 years; 3) thinking about the position on the scale of their son/daughter when he/she will be 35 years old. We calculated two personal mobility indexes, which capture social mobility beliefs taking into account two types of temporal mobility: intragenerational and intergenerational mobility. For *intragenerational personal mobility beliefs*, we calculated the difference between the participant's position on the scale in the next 15 years and the participant's subjective position on the scale at the present; for *intergenerational personal mobility beliefs*, we calculated the difference between the place of the participant's child on the scale and the participant's position in the scale at the present. Therefore, positive scores reflect an upward intra/intergenerational personal mobility belief, while negative scores reflect downward intra/intergenerational personal mobility beliefs.

Societal Mobility Beliefs. Participants were presented with the same MacArthur SSS scale (Adler et al., 2000) and were asked to indicate: 1) What position will a person of the same socioeconomic status be on the scale in the next 15 years; 2) What position will this person's son/daughter be on the scale in the next 15 years. We also calculated two societal mobility indexes as did before. For *intragenerational societal mobility beliefs*, we calculated the difference between the place on the scale of a person with the same participant's socio-economic status in the next 15 years and the place on the scale of a person with the same participant's socio-economic status (i.e., participant's position in the scale at the present); for *intergenerational societal mobility beliefs*, we calculated the difference between the place on the scale of this person's son/daughter when he/she will be 35 years old and the place on the scale of a person with the same participant socio-economic status (i.e., participant's position in the scale at the present). Positive scores reflect an upward intra/intergenerational societal mobility belief, while negative scores reflect downward intra/intergenerational societal mobility beliefs.

Meritocratic Beliefs. The scale was composed of 6 items, which assesses beliefs about how hard work and skill are rewarded and how much people are perceived as deserving of their achievements (Spanish adaptation by García-Sánchez et al., 2022; Zimmerman & Reyna, 2013). Some examples of items are: "People who work hard succeed in their lives"; "If people work hard, they do get what they want". Answers were provided on a 7-point Likert scale ranging from 1 (*totally disagree*) to 7 (*totally agree*). High score means high meritocratic beliefs (α = .87).

The same other measures from Study 1 were used in Study 2: Political orientation, and sociodemographic characteristics.

Analysis plan

To test Hypotheses 1 and 2 we carried out two paired *t-test* using *rstatix* package (Kassambara, 2023). We compared the difference between the means of the following variables: (1) intragenerational personal mobility beliefs vs. intragenerational societal mobility beliefs; (2) intergenerational personal mobility beliefs vs. intergenerational societal mobility beliefs.

Four regression analyses were performed to test Hypothesis 3 (H3a, H3b, H3c, H3d). Our criterion variables were: intragenerational personal mobility beliefs (H3a), intergenerational personal mobility beliefs (H3b), intragenerational societal mobility beliefs (H3c), and intergenerational societal mobility beliefs (H3d), and our predictor variable was meritocratic beliefs. Moreover, we replicated these regression analyses controlling for sociodemographic factors, ideological variables, perceived inequality, and dispositional optimism.

Results

Preliminary Analysis

Descriptive statistics and Pearson correlations between all variables included in Study 2 are reported in Table S3.

Pre-registered Hypotheses

Regarding Hypothesis 1, we found significant differences between scores on intragenerational personal mobility beliefs (M = 0.68, SD = 1.59) and scores on intragenerational societal mobility beliefs (M = 0.41, SD = 1.66), $t(273) = 3.45$, $p < 0.001$, Cohen's d = .16, 95% CI [.07, .26]. We also found significant differences between scores on intergenerational personal mobility beliefs (M = 0.61, SD = 2.01) and scores on intergenerational societal mobility beliefs (M = 0.47, SD = 1.97), $t(273) = 1.90$, $p = 0.029$, Cohen's d = .06, 95% CI [-.00, .13], confirming Hypothesis 2.

As for Hypothesis 3, contrary to our predictions, meritocratic beliefs did not predict any of the different types of personal and societal mobility beliefs assessed (see Table 1): Intragenerational personal mobility (H3a: $\beta = -0.08$, $p = 0.267$; 95% CI [-0.22, 0.06]); Intergenerational personal mobility (H3b: $\beta = -0.01$, $p = 0.878$; 95% CI [-0.20, 0.17]); Intragenerational societal mobility (H3c: $\beta = -0.13$, $p = 0.087$; 95% CI [-0.28, 0.02]); Intergenerational societal mobility (H3d: $\beta = -0.05$, $p = 0.618$; 95% CI [-0.22, 0.13]).

Table 1

Regression Coefficients of Meritocratic Beliefs on Intra/intergenerational Personal and Societal Mobility Beliefs in Study 2

	Intragenerational Personal Mobility Beliefs				**Intergenerational Personal Mobility Beliefs**				**Intragenerational Societal Mobility Beliefs**				**Intergenerational Societal Mobility Beliefs**			
Predictors	*Estimates*	*std. Error*	*CI*	*p*	*Estimates*	*std. Error*	*CI*	*p*	*Estimates*	*std. Error*	*CI*	*p*	*Estimates*	*std. Error*	*CI*	*p*
(Intercept)	0.94	0.25	0.45 – 1.43	**<0.001**	0.65	0.31	0.03 – 1.27	**0.040**	0.82	0.26	0.31 – 1.33	**0.002**	0.62	0.31	0.01 – 1.22	**0.046**
Meritocratic Beliefs	-0.08	0.07	-0.22 – 0.06	0.267	-0.01	0.09	-0.20 – 0.17	0.878	-0.13	0.08	-0.28 – 0.02	0.087	-0.05	0.09	-0.22 – 0.13	0.618
Observations	274				274				274				274			
R^2 / R^2 adjusted	0.005 / 0.001				0.000 / -0.004				0.011 / 0.007				0.001 / -0.003			
Deviance	688.242				1103.336				740.362				1057.352			
AIC	1035.936				1165.251				1055.937				1153.587			

Discussion

Results of Study 2 showed significant differences between personal and societal mobility beliefs. Participants were more optimistic when considering their own personal mobility (intragenerational personal mobility) compared to the mobility of a person of the same social position (intragenerational societal mobility; Hypothesis 1); and when they consider their children's mobility (intergenerational personal mobility) compared with the children of a person of the same social position (intergenerational societal mobility; Hypothesis 2). Furthermore, results showed that the optimistic effect was higher for intragenerational than intergenerational mobility when we compared personal and societal mobility beliefs. In other words, the optimistic bias is stronger when people think about their own lifetime mobility (compared to the lifetime mobility of another person with the same status in society; intragenerational mobility) than when they think about the mobility of their children (compared to the mobility of the children of another person with the same status in society; intergenerational mobility). Regarding Hypothesis 3, meritocratic beliefs did not emerge as a significant predictor of intragenerational personal mobility (Hypothesis 3a), intergenerational personal mobility (Hypothesis 3b), intragenerational societal mobility (Hypothesis 3c), and intergenerational societal mobility (Hypothesis 3d).

Overall, these results indicate that people are more optimistic about their own mobility (personal mobility) than about the mobility of society (societal mobility). Moreover, our data suggest that meritocratic beliefs does not seem to be a relevant variable for the prediction of any of the different types of mobility studied.

General Discussion

The aim of the present research was to examine whether Spanish participants tend to have a more optimistic or pessimistic outlook on social mobility. To do this, we first

contrasted their perceived social mobility with the actual level of economic mobility; secondly, we examined whether they are more optimistic about their own social mobility (compared with the social mobility of others). In two cross-sectional studies conducted in Spain, we found that: (a) Spanish people underestimate the actual economic social mobility in Spain; (b) Spanish people are more optimistic when estimating their future mobility than when estimating the mobility of society; and (c)meritocratic beliefs were unable to explain the optimistic bias in the estimation of social mobility.

These findings align with previous studies suggesting that people find it difficult to accurately estimate actual economic social mobility (Alesina et al., 2018; Duru-Bellat & Kieffer, 2008). Spanish participants underestimated actual economic societal mobility; in particular, the probability that a person born in the poorest group of the Spanish population was likely to move to richer groups. This finding is important since it strengthens the previous hypothesis about contextual differences in social mobility perceptions. This hypothesis raised by Alesina and colleagues (2018), showed that people in the United States overestimate actual societal economic mobility (see also Cheng & Wen, 2019; Davidai & Gilovich, 2015a; Kraus & Tan, 2015), while Europeans (including France, Italy, Sweden, and the United Kingdom) tend to underestimate it.

However, this pessimistic outlook only occurs when Spanish people are thinking about others—not when they are thinking about themselves. As such, people seem to have an optimistic view of their own social mobility (*personal optimism*; McGee & Cairns, 1994; McKenna et al., 1993; Mezulis et al., 2004; Robertson, 1977; Sharot, 2011), but a pessimistic view about the social mobility of other people on their country (*societal pessimism;* Galdi et al., 2020). Importantly, these happened regardless of whether they were thinking about their own future mobility (intragenerational mobility) or the mobility of their children (intergenerational mobility).

A potential explanation for this bias could be related to people's egocentrism and focalism (Kruger, 1999; Kruger & Burrus, 2003; Windschitl et al., 2003). When estimating the probability of having a favorable outcome, individuals may be inclined to focus solely on their own chances of experiencing the event and neglect to properly consider the probability of someone else experiencing the same event. This egocentric tendency can lead to skewed, overly optimistic predictions about the likelihood of a positive outcome.

In short, we found that people tend to be more optimistic about their personal risks than about collective risks, and this bias could also have important consequences. Recent studies have shown that individuals tend to be less supportive of redistribution when they think optimistically about their future in relation to their personal risks, compared to their collective risks (Galdi et al., 2020). The present study provides evidence for a dual perception of social mobility. The personal optimism reflected by our studies could lead to less support for wealth redistribution policies, which should be explored in future studies.

Regarding the predictive capacity of meritocratic beliefs, we did not find robust predictive contributions of meritocratic beliefs to personal and societal mobility. In Study 2, meritocratic beliefs were only found to predict intragenerational personal mobility, even after accounting for sociodemographic factors, ideological variables, perceived inequality, and dispositional optimism. It is therefore plausible that other constructs play a more relevant role in determining the perception of mobility, such as *perceived control* or *self-efficacy*. Research has shown that people tend to be optimistic about their future because they believe it is under their control (Galdi et al., 2020). This finding is consistent with other studies positing that perceived control might be a relevant predictor of personal

optimism and collective pessimism (Chambers et al., 2003; Harris, 1996; Klein & Helweg-Larsen, 2022).

Although our findings expand the existing literature on social mobility beliefs (Cheng & Wen, 2019; Davidai & Gilovich, 2015a; Kraus & Tan, 2015), the present research has some important limitations. In Study 1, although we attempted to reduce the difficulty of mobility estimation, some of the perceptual bias could be explained by simple estimation errors. In Study 2, we controlled for some of the limitations of Study 1 by operationalizing social mobility beliefs through a subtraction using the SSS scale scores (Adler et al., 2000), as has been used in previous studies (Bucca, 2016; Du et al., 2021; Gimpelson & Monusova, 2014; Mijs et al., 2022). However, this approach may also have some limitations. For example, people often place themselves in intermediate positions when asked to indicate their subjective socioeconomic status (Evans & Kelley, 2004), which could introduce measurement errors and affect the results obtained. Therefore, future studies should replicate these results using different measures of social mobility. Another limitation could be related to the order in which we presented the variables. It was, first, personal and then societal mobility. This might have resulted in participants having a reference mobility indicator—anchoring bias—when estimating societal mobility. Future studies should replicate these results by counterbalancing the administration of the two mobility measures to address this limitation.

Conclusions

The present research supports previous research showing that people find it difficult to accurately estimate actual economic social mobility and underestimate it in different European countries (France, Italy, Sweden, and the United Kingdom). Significantly, this research shows that this cognitive bias might relate more to personal mobility than societal mobility. Our results follow that people have a more substantial

optimistic bias when estimating their own mobility (i.e., personal mobility) than when estimating societal mobility (i.e., societal mobility). Moreover, these differences occur regardless of whether people estimate their own mobility over their lifetime (i.e., intragenerational personal mobility) or between generations (i.e., intergenerational personal mobility). Overall, understanding the causes of errors in estimating social mobility and the optimistic bias present in personal mobility beliefs could be important for future research; for instance, research related to the maintenance of inequality, such as research about attitudes toward economic inequality or support for redistributive policies.

Chapter 6

Rising and Falling on the Social Ladder: The Bidimensional Social Mobility Beliefs Scale

Rising and Falling on the Social Ladder: The Bidimensional Social Mobility Beliefs Scale

Juan Matamoros-Lima[1,2*], Guillermo B. Willis[1,2], and Miguel Moya[1,2]

[1]Mind, Brain and Behavior Research Center (CIMCYC), University of Granada, Granada, Spain

[2]Department of Social Psychology, University of Granada, Granada, Spain

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Abstract

Recent works in the field of Social Psychology have shown the importance of studying subjective social mobility from different perspectives. In the literature about subjective societal mobility, most of the research is focused on the mobility-immobility framing. However, several authors suggested studying social mobility beliefs effects differentiating according to mobility's trajectory, that is, upward (i.e., improving status over time) and downward (i.e., getting worse in status over time). The present research was motivated by the lack of measures that discriminate between beliefs in upward and downward societal mobility. Across two studies using different samples of the Spanish adult population, we examined both dimensions of social mobility beliefs and tested their predictive validity on other related constructs. In Study 1 (N = 164), with an EFA, we corroborated the independence between the two types of mobility. The internal structure was confirmed by a CFA in Study 2 (N = 400). Furthermore, it was shown that upward and downward mobility beliefs are differently related to other related constructs. The results from Studies 1-2 showed good convergent validity. In all correlations with the different constructs (attitudes towards inequality, meritocratic beliefs, justification of the economic system, and status anxiety) we found opposite direction effects for both types of societal mobility (upward and downward). The development of this new instrument can help to deepen our understanding of the psychosocial consequences of subjective social mobility, as well as to differentiate two processes that may have different consequences.

Keywords: Upward social mobility, Downward social mobility, Legitimizing Ideologies, Status anxiety, Subjective Social Mobility

Introduction

In objective terms, social class is usually determined by a combination of three types of resources (see e.g., Oakes & Rossi, 2003; Piff et al., 2018; Snibbe & Markus, 2018): economic, educational, and occupational prestige. However, social psychology has emphasized the importance of subjective perception when conceptualizing social class (Antonoplis, 2023; Kraus et al., 2009; Manstead, 2018]. In this way, the psychosocial perspective takes as a reference previous studies carried out in other fields of social sciences and defines *social class* as "a stratification system based on access to resources such as wealth, property, power, and prestige (Moya & Fiske, 2017, p. 9).

Social mobility—the possibility of moving from one social class to another—is a relevant social issue. According to the Organisation for Economic Co-operation and Development (OECD, 2018), around 40% of families in the OECD will remain in the same socioeconomic position from one generation to the next. However, most people still think that it is not difficult to climb up the economic ladder (Alesina et al., 2018; Davidai & Gilovich, 2015a; Kraus, 2015). As such, there is an important gap between objective and subjective social mobility.

Most social psychological research about social mobility has focused on its objective dimension. These studies have operationalized social mobility as a change in income across one's lifespan (Corak, 2013, 2016; D'Addio, 2007) or as a change toward more prestigious occupations (Gimpelson & Monusova, 2014; Kelley & Kelley, 2009). However, the subjective dimension of social mobility has been less studied than objective, even though it has—by itself and independently of its objective counterpart—important social psychological consequences (Gugushvili et al., 2022; Sharrif et al., 2016).

In addition, the few studies examining the social psychology of social mobility have used a mobility vs. immobility framework (Browman et al., 2017; Day & Fiske,

2019), without specifying whether the movement involves moving up to higher classes (i.e., upward mobility) or down to lower classes (i.e., downward mobility). As such, there is not a measure for discriminating between upward and downward social mobility beliefs. In this article, we aim to address this gap and present validity evidence for an instrument that discriminates between beliefs about upward and downward social mobility.

Subjective Social Mobility

Social sciences have mainly emphasized the importance of the objective interpretation of social mobility (Chetty et al., 2017; Corak, 2013; Marqués-Perales & Fachelli, 2021). However, in a complementary way, the psychosocial perspective has focused more on a subjective interpretation (Browman et al., 2021; Davidai & Gilovich, 2015a; Day & Fiske, 2017; Heckhausen, 2013; Kraus & Tan, 2015; Wang et al., 2022; Weiss & Blöchl, 2023) As such, whereas objective social mobility tends to be measured with indicators at the country level, such as the number of people moving from one social strata to the other (Chetty et al., 2014; Jäntti, 2006); subjective social mobility is measured by directly asking people to estimate the degree of mobility they think exists (Browman et al., 2021; Davidai & Gilovich, 2015a).

Subjective social mobility does not necessarily correspond to objective social mobility in the social structure, although an association between the two variables is frequently found (Berger & Engzell, 2020; Fischer, 2009; Gugushvili, 2020; Kelley & Kelley, 2009; Meraviglia, 2017). Social psychology shows that subjective (vs. objective) reality is important in explaining human behavior (Asch, 1952; Davidai et al., 2012). For example, subjective socioeconomic status (Adler et al., 2000; Singh-Manoux et al., 2003) and subjective economic inequality (Castillo et al., 2022; Schmalor & Heine, 2021; Willis et al., 2022) have important consequences over and above their objective counterparts.

Thus, subjective social mobility has important consequences that cannot be explained by objective social mobility (e.g., see Gugushvili, 2016; Präg & Gugushvili, 2021).

In social psychology, subjective social mobility is understood as the belief about changes in status or social class over time (Day & Fiske, 2019). Social mobility is not a unidimensional construct, and there is a need to study the possible effects of different types of social mobility (Browman et al., 2021; Hout, 2015). Davidai and Wienk (2021) argue that the different types of mobility depend on type (relative or absolute), time frame (past/current or future), trajectory (upward or downward), and target of comparison (personal or societal). In the present research, we will focus on subjective social mobility, that is, on beliefs about societal mobility (i.e., expectations about a change of status in society) differentiated according to the mobility's trajectory: upward (i.e., improving status over time) or downward (i.e., getting worse in status over time).

When differentiating between upward and downward mobility, some studies suggest that there is an important bias in the subjective estimation of current social mobility. When thinking about overall social mobility, people tend to think more often about upward rather than downward mobility (Mandisodza et al., 2006). Likewise, Davidai and Gilovich (2015b) found that, when people assess the likelihood of moving along the social ladder, they perceive upward mobility as more likely than downward mobility.

Besides this bias toward upward social mobility, it is also important to differentiate between these two different types of mobility, as they may have different consequences. Schmidt (2010), using a multilevel design including data from 21 countries, showed that experienced downward mobility positively predicted support for redistributive policies, while experienced upward mobility negatively predicted it. In the same vein, Mérola and Helgason (2016) found in an experimental game that, when

participants experienced an increase in income (i.e., upward mobility), they were less supportive of a tax increase; conversely, participants who experienced a decrease in income (i.e., downward mobility) were more supportive of a tax increase. Although the aforementioned studies examined the different consequences of upward and downward mobility, they did so by studying personal experienced mobility rather than beliefs about societal mobility.

In the literature about subjective societal mobility, most of the research is focused on the mobility–immobility framing (Browman et al., 2017; Day & Fiske, 2016). Most studies examine the difference between those who believe that it is easy and those who believe that it is hard to change one's economic status within a given society. But these studies do not make a clear distinction between the two possible types—upward and downward— of social mobility. Recently, some studies have suggested that, as it happens with personal experienced mobility (Mérola & Helgason, 2016; Schmidt, 2010), these two types of mobility can be considered relatively independent constructs (Browman et al., 2021). For instance, in a study conducted in the United States, Browman et al. (2021) found that an increase in perceived inequality decreased beliefs in upward mobility for poorer individuals and in downward mobility for richer individuals. In other words, participants perceived that, when wealth inequality is high, it is more likely that people will remain in their current economic positions.

Social mobility beliefs have been theoretically closely related to different constructs, such as meritocratic beliefs (the belief that getting ahead in society is based on talent and hard work; Mijs, 2021), the Protestant work ethic (the belief that hard work is a moral responsibility that allows one to achieve success; Jost & Hunyady, 2005), and belief in a just world (the belief that people get what they deserve; Lerner, 1980). Nevertheless, there is an important theoretical difference between social mobility beliefs

and these constructs: social mobility beliefs refer only to movement (upward or downward) through different social positions in a predetermined social structure, regardless of the possible causes of the movement (e.g., through effort, talent, hard work, inheritance, or luck; Davidai & Wienk, 2021) or the fairness of such movement (e.g., whether people got what they deserved; Day & Fiske, 2016).

Measuring Subjective Social Mobility

Subjective social mobility has been operationalized as the subjective perception of the difference in one's social status over time (Gimpelson & Monusova, 2014; Mijs et al., 2022; Präg & Gugushvili, 2021; Ritterman et al., 2015). Thus, for instance, using a ladder scale with 10 rungs (Adler et al., 2000), participants estimate the difference between their socioeconomic status at two points in time (present vs. past or future). However, the results of some studies using this scale have found that people tend to place themselves in the middle points of the ladder (Castillo et al., 2013; Evans & Kelley, 2004), making mobility scores obtained with this instrument biased toward the midpoint.

Another way of measuring societal social mobility beliefs is by using numerical estimation of the percentage of people moving from one social stratum (e.g., quintile) to another (Alesina et al., 2018; Browman et al., 2021; Davidai & Gilovich, 2015a; Davidai, Kraus et al., 2015). However, people often have difficulty answering these questions and understanding the meaning of quintile or percentile (Bavetta et al., 2019; Gimpelson & Treisman, 2018; Hauser & Norton, 2017), which prevents this from being a measure of social mobility with sufficient validity evidence.

Finally, different scales with Likert-type responses have been used to measure beliefs in social mobility (Bjornskov et al., 2013; Major, 2002; Yuan & Li, 2019). However, these instruments do not distinguish between upward and downward social mobility. For instance, Browman et al. (2017) used a unifactorial scale measuring social

mobility beliefs that discriminates between high and low beliefs in mobility (or immobility) but does not differentiate the trajectory of mobility.

Taking the above into consideration, we consider it important to develop an instrument that can address the limitations mentioned. Using this new instrument, it would be possible to study the different types of subjective social mobility from a bidimensional perspective, discriminating between the different effects of upward and downward mobility.

Overview of the Current Research

Through the present research, we have attempted to contribute to the study of social mobility from a bidimensional perspective, providing a new validated measurement instrument for studying the correlates of societal mobility beliefs according to their upward or downward trajectory.

For this purpose, we created an item pool about beliefs regarding social mobility (26 items), trying to collect items reflecting upward and downward trajectories (Delgado-Rico et al., 2012; Hambleton, 2005). A panel of experts evaluated different dimensions of the items (see supplementary material for details): *ambiguity*, *representativeness*, *intelligibility*, and *relevance* (Carretero-Dios & Pérez, 2005; Haladyna & Rodriguez, 2013; Lane et al., 2016; Osterlind, 1998). Then, across two studies we examined these two dimensions of social mobility and tested their predictive validity on other related constructs. In Study 1, we conducted an exploratory analysis to identify the factor structure of the item pool. In Study 2, we implemented confirmatory analyses to replicate the previous results. In addition, we tested the reliability of the measure and we analyzed the correlates between both dimensions of social mobility and related constructs.

The preregistration of Studies 1–2, all data code used, and supplementary material to this paper can be found available in the Open Science Framework (https://osf.io/7yqja/).

Study 1

In Study 1, our main goal was to explore whether upward and downward social mobility are two independent and negatively related dimensions in social mobility (Objective 1). To achieve this objective, we carried out descriptive statistics of the items proposed to measure the two types of beliefs in social mobility and explored the factor structure of the scale. We also conducted an exploratory factor analysis and an internal consistency analysis.

Furthermore, to test the predictive validity of the scale, we explored the relationship between the two types of social mobility and other related constructs, such as subjective mobility and immobility (Objective 2) and support for economic inequality (Objective 3). In particular, we tested whether the new instrument measured different social mobility belief dimensions than the instrument developed by Browman et al. (2017). On the other hand, previous research has found a relationship between subjective social mobility and economic inequality. For example, Sharrif et al. (2016), through an experimental study where societal mobility was manipulated through two conditions (high vs. low upward mobility), found that higher subjective upward mobility increased support for economic inequality. In other words, upward social mobility beliefs increase tolerance toward inequality. In this sense, we argue that, when people perceive that it is easy to move up on the social ladder (upward mobility), they will report positive attitudes toward economic inequality, whereas, when people perceive that it is easy to move down on the social ladder (downward mobility), they will report negative attitudes toward economic inequality.

Method

Participants and Procedure

The survey was completed by 172 participants. Eight participants were excluded because they did not fulfill the preregistered inclusion criteria. The final sample (N = 164) consisted of 47.56% women (51.22% men and 1.22% other), with M_{age} = 43.41 years (SD = 12.34) and M_{income} = €5064.32 (SD = 12172.53). Most participants were in a relationship or married (76.22%), had an undergraduate or graduate education (80.48%), and worked full-time (75.46%; see S1 Table).

Data collection was carried out between Jun 08, 2021, and Jun 28, 2021. Data was reached online through social networks (e.g., Facebook, Twitter, etc.). Voluntary participation in the study was requested via text message targeted to social network users. The message consisted of a short text encouraging participation in a study on social issues and a link to access the survey. Participants gave their written consent to participate in the study, and the anonymity of their responses was guaranteed. There was no monetary compensation for participation in the study. The study was conducted after receiving approval from the Research Ethics Commission of the University of Granada (Date of approval: January 08, 2020; Approval Number: 969/CEIH/2019).

Measures

Bidimensional Social Mobility Beliefs Scale (BSMBS). Twenty items selected by a panel of experts were used (see supplementary material for more details) to assess beliefs about types of social mobility: upward and downward. Answers were provided on a 7-point Likert scale ranging from 1 (*totally disagree*) to 7 (*totally agree*).

Social Mobility Beliefs Scale (SMBS). This scale is made up of eight items (own translation from Browman et al., 2017) for measuring social mobility beliefs from a unidimensional perspective (mobility vs. immobility). Answers were provided on a 7-

point Likert scale, ranging from 1 (*totally disagree*) to 7 (*totally agree*). Items included, for example, "Everyone, no matter who they are, can significantly change their status in society," and, "People can substantially change their status in society." High scores mean high beliefs in social mobility (α = .89).

Support for Economic Inequality Scale (SEIS). Participants answered the Spanish version of the SEIS, with five items (Spanish adaptation by Montoya-Lozano et al., 2023; Wiwad et al., 2019). The response format was a 7-point Likert scale, ranging from 1 (*totally disagree*) to 7 (*totally agree*). The items included, for instance, "I am very concerned about the degree of economic inequality that exists in Spain today". High scores mean high support toward economic inequality (α = .82).

Sociodemographic Characteristics. Finally, we asked about some sociodemographic variables of participants: gender, age, nationality, marital status, educational attainment, occupation, participant's income (calculated through a division of household income by number of members), subjective socioeconomic status (Adler et al., 2000), and political orientation (from 1 = *far left* to 7 = *far right*).

Statistical Analyses

To test whether beliefs in social mobility can be modeled by a two-dimensional (vs. one-dimensional) model and whether it shows evidence of internal validity, we conducted an EFA instead of other data reduction techniques, such as a principal component analysis. This was due to several key reasons. Firstly, the theoretical review and our empirical objectives turn towards modeling a two-dimensional model, that is, towards developing a measurement tool in which various indicators are intercorrelated with a smaller number of latent variables (Brown, 2015). Secondly, EFA assumes a theoretical relationship between observed and latent variables (Catena et al., 2003; Floyd & Widaman, 1995; Krishnakumar & Nagar, 2008). Finally, since EFA and CFA are based

on the common factor model (see Thurstone, 1947), previous research suggests that EFA-based estimates are more likely to generalize to confirmatory factor analyses than principal component analysis (Floyd & Widaman, 1995).

A prerequisite for applying exploratory factor analysis is that the observed variables (items) are related to each other (Catena et al., 2003; Cortina, 1993). Therefore, we previously verified that the factor solution was interpretable using Bartlett's sphericity and Kaiser-Meyer-Olkin index (DeVellis & Thorpe, 2021; Tabachnick & Fidell, 2007). After that, we performed a parallel analysis to determine the number of factors to retain (Costello & Osborne, 2019; Horn, 1965). This is because it has been said of the Kaiser criterion (eigenvalues > 1) that "it can result in either overfactoring or underfactoring" (Brown, 2015, p. 23). Finally, we conducted an exploratory factor analysis (EFA) using principal axis factoring because the normality assumption could not be corroborated, and oblique rotation (direct oblimin) due to the correlation between the factors was expected (Brown, 2015; Catena et al., 2003). We used the *psych* package (Revelle, 2021) to perform all the analyses mentioned. Analyses were carried out with R software R Core Team, 2022).

Results

Exploratory Factorial Analysis

Both the Bartlett's sphericity (Chi-square = 1771.58, df = 190, $p < .001$) and Kaiser-Meyer-Olkin index (.90), confirmed the relevance of this type of analysis. Horn's parallel analysis (1966) suggest retaining three factors accounting for 52% of the variance. Then, an oblimin rotation with a factorial solution restricted to three factors was performed. The first factor accounted for 26% of the variance, the second factor for 20%, and the third factor for 6%. Of the 20 items, 8 (loadings ≥ .65) were loaded on the first factor, 6 (loadings ≥ .50) were loaded on the second factor, 1 item were loaded both on

the first and third factor, and 3 items were loaded both on the second and third factor. Two items did not load on either of these factors because their weights were lower than .3. No items were charged only in the third factor.

According to our purpose of developing a bifactorial scale that discriminates between upward and downward social mobility beliefs, we decided to eliminate items that 1) showed a high mean compared to the mean of its factor (see Table 1); 2) did not load on any of the three factors; 3) loaded simultaneously on different factors (see Table 2).

Table 1

Descriptive Statistics of Items (Study 1)

Item label	M	SD	Skewness	Kurtosis
Upward social mobility				
BSMBS_1u	3.74	1.68	0.08	-0.91
BSMBS_2u	4.34	1.60	-0.40	-0.52
BSMBS_3u	3.81	1.64	0.13	-0.78
BSMBS_4u	3.82	1.50	-0.01	-0.65
BSMBS_5u	3.77	1.50	-0.29	-0.73
BSMBS_6u	3.56	1.67	0.11	-0.94
BSMBS_7u	5.40	1.47	-1.03	0.71
BSMBS_8u	3.41	1.55	0.30	-0.42
BSMBS_9u	4.18	1.53	-0.09	-0.71
BSMBS_10u	4.02	1.55	0.05	-0.68
Downward social mobility				
BSMBS_11d	3.65	1.66	0.16	-0.94
BSMBS_12d	3.40	1.57	0.34	-0.41
BSMBS_13d	3.13	1.47	0.36	-0.52
BSMBS_14d	3.47	1.50	0.22	-0.62
BSMBS_15d	3.79	1.55	0.38	-0.49
BSMBS_16d	3.22	1.37	0.22	-0.38
BSMBS_17d	2.65	1.66	1.10	0.45
BSMBS_18d	3.12	1.48	0.43	-0.33
BSMBS_19d	3.31	1.51	0.51	-0.23
BSMBS_20d	3.76	1.64	0.1106	-0.829

Note: N = 164; M, mean; SD, standard deviation

Table 2

Loadings of Bidimensional Social Mobility Beliefs 20 Items Scale (Study 1)

Items	F1	F2	F3	h^2
BSMBS_8u	0.81			0.61
BSMBS_1u	0.79			0.66
BSMBS_6u	0.76			0.61
BSMBS_3u	0.76			0.59
BSMBS_9u	0.74			0.63
BSMBS_5u	0.71		-0.32	0.60
BSMBS_4u	0.68			0.55
BSMBS_10u	0.66			0.67
BSMBS_2u	0.65			0.53
BSMBS_14d		0.75		0.54
BSMBS_18d		0.75		0.61
BSMBS_20d		0.73		0.59
BSMBS_13d		0.70		0.50
BSMBS_11d		0.62		0.41
BSMBS_19d		0.53	0.30	0.44
BSMBS_16d		0.50		0.49
BSMBS_7u				0.20
BSMBS_17d				0.04
BSMBS_15d		0.36	0.61	0.60
BSMBS_12d		0.35	0.51	0.52

Note: N = 164; F, factor; h^2, communality; Standardized loadings > .30 are reported; in bold the items of the final scale

After that, we performed a second Horn's parallel analysis (1966), which suggested retaining only two factors accounting for 55% of the variance. Then, an oblimin rotation with a factorial solution restricted to two factors was performed again. The first factor accounted for 30% of the variance and the second factor for 25%. Of the 14 items, 7 (loadings ≥ .67) were loaded on the first factor, 7 (loadings ≥ .60) were loaded on the second factor.

Descriptive Statistics and Discrimination and Reliability Index

In order to explore whether the set of items selected for each factor presented a high discriminatory capacity, the discrimination index for each item was calculated (Carretero-Dios & Pérez, 2005). For this purpose, the corrected correlation coefficient

between the item score and the total score of the item's factor of belonging was carried out. Values with a deviation equal to or greater than +/- .30 were considered adequate (Nunnally & Bernstein, 1995). In addition, we calculated the difference between the correlation item- belonging factor and item-opposite factor (Jackson, 1970). Items with differences between the correlations lower than .15 were eliminated. Finally, to explore the homogeneity of the factors, the mean inter-item correlation was carried out (Clark & Watson, 2003) and the Cronbach's reliability index was calculated. Considering the results of the above analysis, 6 items were eliminated: items 1, 3, 6, 16, 19, and 20.

In the version of the 8-items scale, the corrected item-total correlation in all the items was greater than .67. This result was observed for both upward social mobility (between .74 and .76) and downward social mobility (between .68 and .72) responses. Differences between the correlation item-belonging factor and item-opposite factor ranged from .16 to .33 for upward mobility items and .13 to .27 for downward mobility items. The mean inter-item correlation for each factor ranged from .58 to .60 for upward mobility and .51 to .54 for downward mobility, with Cronbach's alpha > .80 for both social mobility beliefs (upward: $\alpha_{Cronbach}$ = .85; downward: $\alpha_{Cronbach}$ = .81). The overall mean for upward mobility was 3.86 (*SD* = 1.28), while for downward mobility it was 3.34 (*SD* = 1.22).

Exploratory Analysis

A bivariate Pearson correlation between upward and downward social mobility beliefs and other variables included in this study was carried out. As shown in Table 3 upward social mobility beliefs correlated positively with social mobility beliefs scale (r = .53, p < 0.001), and support for economic inequality scale (r = .32, p < 0.001). Downward social mobility beliefs presented opposite direction correlations, that is, it

correlated negatively with social mobility scale (r = -.45, p < 0.001), and support for economic inequality scale (r = -.30, p < 0.001).

Table 3
Correlations Coefficients between Upward and Downward Social Mobility Beliefs and Other Constructs (Study 1)

	M	SD	USM	DSM	SMBS	SEIS	SSS
USM	3.86	1.28					
DSM	3.34	1.22	-0.53***				
SMBS	4.07	1.33	0.53***	-0.45***			
SEIS	1.86	1.10	0.32***	-0.30***	0.37***		
SSS	5.93	1.45	0.28***	-0.33***	0.41***	0.26**	
PO	2.74	1.24	0.45***	-0.38***	0.40***	0.43***	0.21**

Note: N = 164; USM, Upward Social Mobility; DSM, Downward Social Mobility; SMBS, Social Mobility Beliefs Scale; SEIS, Support for Economic Inequality Scale; SSS, Subjective Socio-economic Status; PO, Political Orientation; M, mean; SD, standard deviation; *p < 0.05, **p < 0.01, ***p < 0.001

To examine whether our scale measured a different type of mobility than Browman et al. (2017) scale, we also ran an exploratory analysis with all items from both scales. Horn's parallel analysis (1965) suggested retaining three factors. Then we performed an oblimin rotation with a factorial solution restricted to three factors. The three factors were: Factor 1, items from Browman et al. (2017) scale; Factor 2, items related to the upward mobility factor; Factor 3, items related to the downward mobility factor (see S2 Table).

Discussion

The results showed that beliefs about upward social mobility can be considered different from those about downward social mobility (Objective 1). Regarding the internal structure observed through the EFA, it would be necessary to confirm it in an independent sample. On the other hand, exploratory analyses seem to suggest that the SMBS proposed by Browman et al. (2017) appears to measure beliefs in upward social

mobility (vs. immobility), rather than downward mobility (Objective 2) and that there is an inverse relationship between both types of social mobility and support for economic inequality, positive for upward mobility and negative for downward mobility (Objective 3).

Study 2

In Study 2, we aimed to corroborate the bifactorial structure of the social mobility scale using an independent sample from Study 1. Regarding the predictive validity of the scale, we examined the relationship between beliefs about upward and downward social mobility, ideologies, and perceived threat.

Recent studies suggest that ideological beliefs may play a role in legitimizing the status quo (Mijs, 2021). These variables may have a palliative effect on the distress derived from perceiving the world as unfair (Jost, 2019; Napier et al., 2020). Likewise, believing that it is possible to move up in society could increase support for these ideological beliefs.

On the contrary, perceiving downward mobility could decrease the defense of these legitimizing myths. For example, people who believe that their social position may worsen (vs. improving) in the future display lower perceived control over their lives (Fritsche et al., 2017). In this sense, people who perceive high downward mobility may believe that they can lose their position on the social ladder, which, as a result, increases their status anxiety. On the contrary, perception of high upward mobility could decrease status anxiety.

To summarize, we expected that upward social mobility beliefs would be positively associated with meritocratic beliefs and economic system justification, whereas downward social mobility beliefs would be negatively associated with meritocratic beliefs and economic system justification. For perceived threat variables, we

expected that upward social mobility beliefs would be negatively associated with status anxiety, while downward social mobility beliefs would be positively associated with status anxiety.

In the preregistration plan, we preregistered that there will be a difference in how strong these associations are (i.e., we predicted both the direction and the strength of the associations). Given that these hypotheses are not one of the main points of the present manuscript, which is focused on presenting the validity evidence of the Social Mobility Scale, we present these analyses in the Supplementary Materials.

Method

Participants and Procedure

The survey was completed by 414 participants. Based on the preregistered inclusion criteria, 14 participants were excluded. The final sample was composed of 400 participants. The sample consisted of 60.75% women (38.25% men and 1% other), with M_{age} = 32.50 years (*SD* = 14.05), and M_{income} = €2863.01 (*SD* = 5879.58). Most of the participants were married or in a relationship (54%), had a university or postgraduate education (58.5%), and worked full time (44%; see S1 Table).

Data collection was carried out between Nov 16, 2021, and Dec 30, 2021. Data was reached online through social networks (e.g., Facebook, Twitter, etc.) and the institutional mail of a university in southeast Spain. Voluntary participation in the study was requested via text message. Participants gave their written consent to participate in the study, and the anonymity of their responses was guaranteed. Participants in the study were entered into a €50 prize draw among all participants. The study was conducted after receiving approval from the Research Ethics Commission of the University of Granada (Date of approval: January 08, 2020; Approval Number: 969/CEIH/2019).

Measures

Bidimensional Social Mobility Beliefs Scale (BSMBS). To validate the BSMBS, we used the eight items of the BSMBS after analyzing the data obtained from Study 1 (e.g., "In Spain, children often achieve a higher socioeconomic status than the household in which they grew up"; "The children of Spanish people come to belong to a higher social class compared to the class they come from"; "In Spanish society, most people have lower incomes from one generation to the next"; "The majority of Spanish families have lower social positions than the previous generation"; see S1 Appendix). High scores on upward/downward social mobility mean high beliefs in the different types of mobility.

Meritocratic Beliefs Scale (MBS). Participants responded to the Spanish version of the MBS (Spanish adaptation by García-Sánchez et al., 2022; Zimmerman and Reyna, 2013). The response format was a 7-point Likert scale, ranging from 1 (*totally disagree*) to 7 (*totally agree*). This scale is composed of six items (e.g., "People who work hard do achieve success", "If people work hard, they do get what they want"). High scores mean high meritocratic beliefs ($\alpha = .92$).

Economic System Justification Scale (ESJS). To measure this construct, we used the Spanish version of the ESJS (Spanish adaptation by Jaume et al., 2012; Jost & Thompson, 2000), composed of seven items. The response format was a 7-point Likert scale ranging from 1 (*totally disagree*) to 7 (*totally agree*). Examples of items are: "The gap between social classes reflects differences in the natural order of things" and "It is good to have an economic system that rewards those who make an effort". High scores mean high economic system justification ($\alpha = 0.83$).

Status Anxiety Scale (SAS). We used the Spanish version of the SAS (Spanish adaptation by Melita et al., 2020; Keshabyan & Day, 2020). The response format was a 7-point Likert scale, ranging from 1 (*totally disagree*) to 7 (*totally agree*). This scale is

composed of five items (e.g., “I worry that my social status will go down,” “I worry that my current social status is too low”). High scores mean high status anxiety ($\alpha = 0.87$).

Sociodemographic Characteristics. Finally, we asked about some of the participants’ sociodemographic variables: gender, age, nationality, marital status, educational attainment, occupation, participant’s income (calculated through a division of household income by number of members), subjective socioeconomic status (Adler et al., 2000), and political orientation (from 1 = *far left* to 7 = *far right*).

Statistical Analysis

We conducted a confirmatory factor analysis (CFA) with the aim of exploring whether the dimensional structure observed in Study 1 was replicated. For that purpose, we used the *lavaan* package (Rosseel, 2012). Considering non-independence of observations as well as the possible non-normality of the data, we used the robust maximum likelihood (MLR) estimation (Kaplan, 2009). The model fit was assessed with the root mean square error of approximation (RMSEA) with a 90% confidence interval (CI), standardized root mean square residual (SRMR), Tucker–Lewis index (TLI), and the comparative fit index (CFI). RMSEA and SRMR values less than .06 and TLI and CFI values greater than .95 indicate good model fit (Brown, 2015). Two different models were tested (see Table 4): a unifactorial model (Model 1), composed of one factor of social mobility; and a bifactorial model (Model 2), composed of two factors of social mobility (i.e., upward and downward social mobility). Also, we explored the homogeneity of the observed variables (items) in relation to the latent variables (factors) of belonging. Following this goal we performed a descriptive analysis of each item and assessed its discrimination index with the corrected item–total correlation method (Carretero-Dios & Pérez, 2005) using the *psych* package (Revelle, 2021). Analyses were carried out with R software (R Core Team, 2022).

Table 4
Confirmatory Factor Analysis of the Bidimensional Social Mobility Beliefs Scale (Study 2)

Models	Chisq	df	p-value	CFI	TLI	SRMR	RMSEA [90% CI]
Model 1	297.497	20	0	0.63	0.48	0.11	0.18 (.16, .20)
Model 2	30.070	19	0.051	0.98	0.97	0.03	0.03 (.01, .05)

Note: N=400; CFI = Comparative fit index; TLI = Tucker-Lewis index; SRMR = Standardized Root Mean Square Residual; RMSEA = root-mean-square error of approximation; CI = confidence interval; Model 1 = one factor of social mobility. Model 2 = two-factors, composed by upward and downward social mobility.

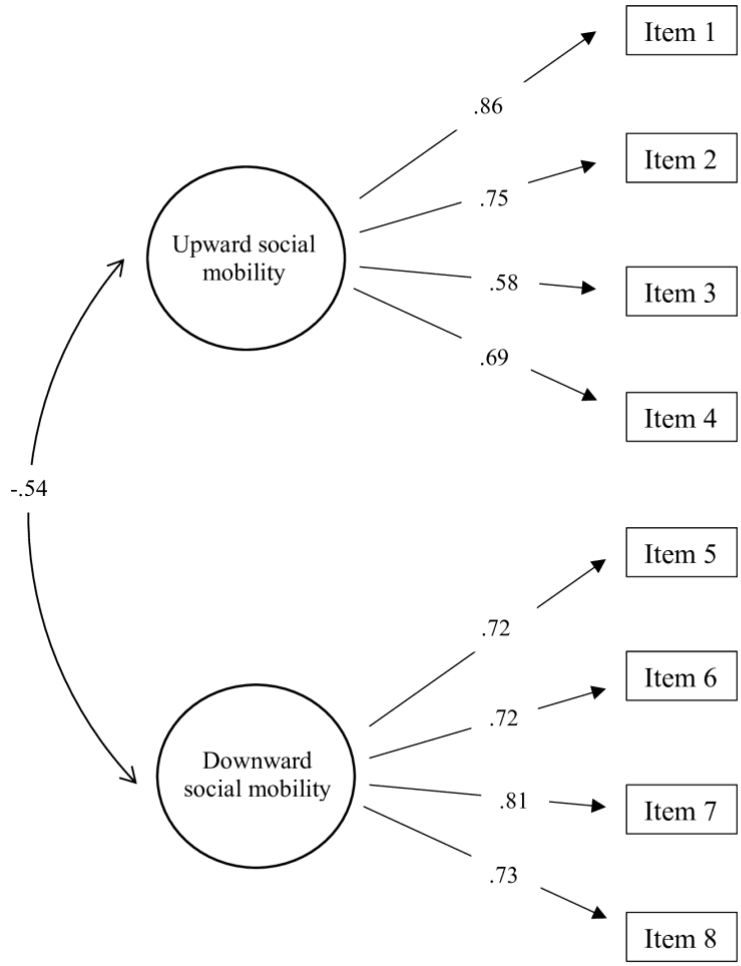
Results

Confirmatory Factorial Analysis

Firstly, unifactorial and bifactorial models were compared and, we found significant differences between both models (χ^2 = 161.85, df = 1, p < .001). Then, CFA confirmed that a bifactorial model (i.e., upward and downward social mobility) showed the best model fit in the assessed sample (see Table 4). A bifactorial model including 8 items (4 items per upward factor and 4 items per downward social mobility) was specified. All items have factor loading >.68 (see Fig 1). The results revealed a good fit of the bifactorial model: χ^2 = 30.070, df = 19, p = .051; CFI = .98; TLI = .97; SRMR=.03; RMSEA = .03, 90% CI (.01, .05). Internal consistency was adequate (Upward: $\alpha_{Cronbach}$ = 0.81; $\omega_{MacDonald}$ = 0.81; $r_{meaninter\text{-}item}$ = 0.52); Downward: $\alpha_{Cronbach}$ = 0.83; $\omega_{MacDonald}$ = 0.83; $r_{meaninter\text{-}item}$ = 0.55). To provide a more robust of the structure and stability of BSMBS, we also explored the invariance based on different variables. We examined configural, metric, scalar, and residual invariance across gender (Male, Female) and Subjective Socioeconomic Status ("≤ 5" = Low SSS; "≥ 6" = High SSS). The results showed a good

fit of configural, metric, scalar, and residual invariance across Gender (see S6 Table), and Subjective Socioeconomic Status (see S7 Table).

Fig 1. Dimensions of Bidimensional Social Mobility Scale (Standardized Factor Loading)



Descriptive Statistics and Discrimination and Reliability Indices

All items showed adequate results in the discrimination index (see S10 Table): corrected item-total correlation (upward: ≥ .58; downward: ≥ .70). All standard deviations

were higher than 1.2. Participant's mean score on the scale was, 3.85 (*SD* = 1.09) for the upward social mobility, and 3.43 (*SD* = 1.13) for the downward social mobility.

Corroboration of Hypotheses

A bivariate Pearson correlation between the scores in the upward and downward social mobility beliefs and those obtained in the other variables included in this study was carried out. As shown in Table 5, upward social mobility beliefs correlated positively with meritocratic beliefs (r = .53, $p < 0.001$), economic system justification (r = .43, $p < 0.001$) and negatively with status anxiety (r = -.17, $p < 0.001$). Downward social mobility beliefs presented the opposite direction effect correlations, that is, it correlated negatively with meritocratic beliefs (r = -.24, $p < 0.001$) and economic system justification (r = -.18, $p < 0.001$), and positively with status anxiety (r = .26, $p < 0.001$).

Table 5
Correlations Coefficients between Upward and Downward Social Mobility Beliefs and Other Constructs (Study 2)

	M	SD	USM	DSM	MBS	ESJS	SAS	SSS
USM	3.85	1.09						
DSM	3.43	1.13	-0.44***					
MBS	2.94	1.42	0.53***	-0.24***				
ESJS	2.96	1.14	0.43***	-0.18***	0.79***			
SAS	4.24	1.51	-0.17***	0.26***	-0.13**	-0.03		
SSS	5.74	1.37	0.32***	-0.13**	0.26***	0.26***	-0.19***	
PO	2.71	1.22	0.26***	-0.06	0.53***	0.59***	0.04	0.15**

Note: N = 400; USM, Upward Social Mobility; DSM, Downward Social Mobility; SMS, Social Mobility Scale; MBS, Meritocratic Beliefs Scale; ESJS, Economic System Justification Scale; SAS, Status Anxiety Scale; SSS, Subjective Socio-economic Status; PO, Political Orientation; M, mean; SD, standard deviation; *p < 0.05, **p < 0.01, ***p < 0.001

Discussion

The results replicated the internal structure of the BSMBS. The use of CFA adds empirical evidence to the conceptualization of both types of social mobility (upward and downward) as different entities. Furthermore, the results established a different relationship pattern among both types of social mobility and meritocratic belief, economic system justification ideology, and status anxiety. Our goal was to develop a measure that differentiates between upward and downward mobility instead of merely differentiating between mobility and immobility. Existing validated scales have treated mobility as a single construct. From this last perspective, it could be assumed that both types of mobility (upward and downward) have the same relationship with other variables. But we have shown that they do not: Upward is positively correlated with meritocracy and economic system justification, whereas downward is negatively correlated with it; the opposite is true when considering status anxiety.

General Discussion

The present research was motivated by the lack of measures that discriminate between beliefs in upward and downward societal mobility. Two studies showed that social mobility beliefs is a variable composed of two different dimensions: upward and downward mobility. In Study 1, with an EFA using a pool of 20 items, we corroborated the independence between the two types of mobility. This result was confirmed by a CFA in Study 2. Furthermore, we showed that upward and downward mobility beliefs are differently related to other related constructs.

We also showed that the BSMBS discriminates between two types of beliefs in societal mobility according to its trajectory: upward and downward. The internal structure of the scale is composed of two subfactors (upward and downward), and it showed good fit indices. The results from Studies 1–2 showed a good convergent validity. In all

correlations with the different constructs (attitudes toward inequality, meritocratic beliefs, justification of the economic system, and status anxiety), we found opposite effects for the two types of societal mobility (upward and downward).

On the one hand, these findings are aligned with previous approaches suggesting that both types of mobility could be considered as relatively independent constructs (Browman et al., 2021). On the other hand, the negative relationship between upward and downward societal mobility could be an important contribution to the study of subjective social mobility and its possible consequences. Taking these results into account, these effects could be two competing effects which could suppress each other (MacKinnon et al., 2000). Hence, the inclusion of both types of mobility in the same model could lead to non-significant results, or suppression effect. This could shed light on a more accurate and holistic view of subjective social mobility, helping to clarify whether the two types of social mobility can be understood as opposing mechanisms of mobility.

Future studies should test, through different methodologies, whether the negative relationship between upward and downward societal mobility beliefs holds.

A further important contribution could be the opposite direction in all effects found between upward and downward societal mobility on different constructs. A possible interpretation of the above results could be related to expectations about gaining and losing status (Petit et al., 2010). That is, upward mobility beliefs could increase individuals' hope for increasing their status, and this could lead to support for the economic status quo and feeling less status anxiety. Furthermore, people with downward mobility beliefs could think of a probable loss of status, and this could lead to less support for the status quo and feeling more status anxiety.

Measuring social mobility beliefs can be a difficult task due to the limited consensus on its theoretical definition and the complexity of the interconnected concepts

(e.g., meritocracy, Protestant work ethic, etc.). As mentioned in the introduction, some instruments focus on the study of other types of social mobility (Browman et al., 2017), while others use measures that can be tedious and difficult to solve for participants (Alesina et al., 2018; Davidai, 2018). This research showed the importance of studying subjective social mobility according to the trajectory considering its two dimensions: upward and downward.

The strength of the correlation between mobility beliefs and different legitimizing variables (meritocratic beliefs, justification of the economic system, attitudes toward inequality) was stronger for upward (vs. downward) mobility beliefs. These results are in line with previous studies (Mijs et al., 2022) showing the relationship between social mobility and different ideological variables and suggesting the role of upward social mobility beliefs as a possible ideological variable (Major et al., 2002). Also, our findings support the Prospect Of Upward Mobility theory (POUM; Benabou & Ok, 2001), which suggests that individuals are willing to accept the elevated status of the wealthy because they anticipate the possibility of themselves or their children climbing to such ranks in the future. As a result, they aim to maintain the advantages associated with their prospective economic position. These results extend the literature on social mobility and go beyond previous studies by discriminating between different upward and downward mobility effects and their consequences on *statu quo* maintenance.

Concerning status anxiety, our results show consistency with the results of Melita et al. (2023). Authors suggest that status anxiety might be more associated to downward mobility beliefs than upward mobility. One possible interpretation could be related to the characteristics of our sample. First, the literature on social classes has shown differences between the living conditions of different social classes (Manstead, 2018). Second, most participants self-placed themselves in intermediate positions on the social scale.

Therefore, the anxious effect may be stronger when holding beliefs that imply projections of future status loss and less so when being in intermediate positions on the social scale when holding beliefs that imply projections of future status gain. This may be because participants in our study might evaluate intermediate positions on the social scale as optimal positions where good living conditions exist, holding beliefs that imply projections of future status gain.

We believe that this research makes important contributions, yet it also has some limitations. For example, the sample of our studies does not represent Spanish society in terms of some sociodemographic characteristics (e.g., subjective socio-economic status, political orientation, participants' educational attainment). However, as Winton and Sabol (2022) point out, non-representative samples are useful when studying the psychometric properties of a scale, since this type of study focuses on different measurement characteristics rather than the possible outcomes derived from the scale. The structure and validity evidence for a measuring instrument is based on the consistency between indicators and their ability to reflect expected relationships with other related constructs (Bandalos, 2018). Although we consider that the differences between the two dimensions of social mobility beliefs could be replicated in other samples and contexts, we acknowledge the limitation of having conducted our study in one specific context. Future studies should investigate whether the social mobility beliefs scale retains its psychometric properties in other circumstances and cultural contexts.

Based on our results, we believe that the development of this new instrument can help to deepen our understanding of the psychosocial consequences of subjective social mobility, as well as to differentiate two processes that may have different consequences. For instance, social mobility beliefs may be related to social income comparisons (e.g., Frey & Stutzer, 2002): it is likely that people who think they will go down will compare

themselves to those behind them, while those who think they will go up will tend to compare upwards. Also, it may be important to explore whether there are cross-cultural differences on these beliefs (e.g., Du et al., 2021). For instance, it may be argued that in individualistic countries low upward mobility may be more consequential, potentially leading to increased levels of status anxiety. Furthermore, it would also be interesting to study whether upward social mobility beliefs (vs. downward beliefs) could be a way to operationalize ideology. From this perspective, it could moderate the effects of perceived inequality on several social and psychological outcomes (Willis et al., 2022).

Finally, although we consider that the differences raised between the two dimensions of social mobility beliefs could be replicated in other samples and context, we also acknowledge the limitation of having conducted the study in a specific context. Future studies should test whether the BSMBS maintains its psychometric properties in other circumstances and cultural contexts. It would also be useful to conduct experimental manipulations on different types of mobility beliefs to test causal relationships between upward and downward mobility beliefs and their possible psychosocial effects.

Chapter 7

Social Mobility Beliefs and Attitudes Toward Redistribution: Potential Explanatory Mechanisms

Social Mobility Beliefs and Attitudes Toward Redistribution: Potential Explanatory Mechanisms

Juan Matamoros-Lima[1,2], Silvia Galdi[3], Miguel Moya[1,2], and Guillermo B. Willis[1,2]

[1]Mind, Brain and Behavior Research Center (CIMCYC), University of Granada, Granada, Spain

[2]Department of Social Psychology, University of Granada, Granada, Spain

[3]Department of Psychology, University of Campania "Luigi Vanvitelli", Caserta, Italy

Abstract

Economic inequality is a significant problem of modern society, and redistributive policies are one of the most effective tools for reducing it. Previous studies have highlighted the importance of social mobility to understand attitudes toward redistribution. Across three preregistered studies (N = 2475; one cross-sectional and two experimental) in different countries (Italy and Spain), we investigated the relationship between upward and downward societal mobility beliefs and attitudes toward redistribution, as well as potential explanatory mechanisms. Results showed that when people believe that it is easy to improve the socioeconomic status in their society, they oppose redistributive policies; conversely, when people believe that is difficult, they support redistributive policies. Importantly, meritocratic beliefs explained the upward mobility effect on redistribution, and perceived personal economic risks accounted for the downward mobility effect. Implications of these results for the design of policies to reduce economic inequality are discussed.

Keywords: Upward social mobility, downward social mobility, redistribution, meritocracy beliefs, perceived personal economic risk

Introduction

The economic gap between the richest and the poorest is continuing to grow around the world (Chancel et al., 2022; Christensen et al., 2023). Redistributive policies, are recognized as one of the most effective routes for reducing economic inequality (Alvaredo et al., 2018; Atkinson, 2015; Piketty, 2015; Stiglitz, 2015) and its aversive personal, interpersonal, and societal consequences (Castillo et al., 2022; Sánchez-Rodríguez et al., 2019; Sommet et al., 2018; Sprong et al., 2019; Willis et al., 2022). However, although higher levels of economic inequality are associated with greater support for government intervention (Andersen & Curtis, 2015; Evans & Kelley, 2018; Schmidt-Catran, 2016), people often fail to support concrete redistribution strategies (e.g., Kuziemko et al., 2015; Lupu & Pontusson, 2011). A crucial issue is, therefore, to identify the factors driving the support for redistribution in society.

From this perspective, several studies have documented that differences in social mobility—the change in the socioeconomic status of a person over time (Day & Fiske, 2019)—are crucial predictors of differences in people's preferences for redistribution (e.g., Alesina & La Ferrara, 2005; Benabou & Ok, 2001; Owens & Pedulla, 2014; Piketty, 1995). Interestingly, other research has suggested that believing that it is possible to move up the social ladder attitudes toward redistribution (Garcia-Muniesa, 2019; Shepelak, 1989).

Nevertheless, the relationship between various types of social mobility beliefs (upward vs. downward; Davidai & Wienk, 2021) and attitudes toward redistribution, as well as the possible psychological mechanisms that explain these relationships, have not been studied in depth. For the purpose of filling this gap, the present research sought to take this argument one step further by investigating the relationship between upward and downward social mobility beliefs and attitudes toward redistribution, as well as

addressing the role played by two psychological explanatory mechanisms of this relationship: meritocratic beliefs and perceived personal economic risks.

Social Mobility and Attitudes Toward Redistribution

Attitudes toward redistribution can be understood as the support or opposition to social spending programs aimed at reducing the gap between the better off and the less well off (Luebker, 2014). According to political economic models, support for redistribution is a rational decision based on self-interest (Kim & Lee, 2018; Meltzer & Richard, 1981). However, whether or not people support redistributive policies can be affected by a number of factors other than self-interest (Corneo & Grüner, 2002; Fong, 2001). For example, support for redistribution may be negatively affected by the individual's subjective, rather than objective, socioeconomic status (Brown-Iannuzzi et al., 2015). Also, preferences for redistribution may be guided by ideologies. Previous studies have shown that people who endorse system-justifying ideologies and citizens positioned on the right of the ideological spectrum are less inclined to support redistribution (Alesina et al., 2012; Ballard-Rosa et al., 2017; García-Sánchez et al., 2020; Rodríguez-Bailón et al., 2017).

From social psychology, various types of social mobility are distinguished (Davidai & Wienk, 2021; Day & Fiske, 2019); for example, time frame (past, current, or future), trajectory (upward or downward), and target of comparison (personal or societal). In the same vein, previous studies have shown that upward (i.e., improving subjective status over time) and downward (i.e., getting worse subjective status over time) social mobility beliefs can be considered two separate constructs with different consequences (Browman et at., 2021; Davidai & Gilovich, 2015b, 2018; Matamoros-Lima, Willis & Moya, 2023; Melita, Gobel et al., 2023).

Objective social mobility plays a role in predicting differences in preferences for redistribution regardless of the person's SES (Piketty, 1995). Many studies have found support for this assumption (Alesina & La Ferrara, 2005; Alesina et al., 2018; Benabou & Ok, 2001), showing that people who have experienced downward social mobility (i.e., personal intergenerational deterioration of socioeconomic status) favor redistribution, whereas those who have experienced upward social mobility (i.e., personal intergenerational advancement in socioeconomic status) resist it (Alesina et al., 2018; Merola & Helgason, 2016). According to some scholars, however, the effects of people's experience on preferences for redistribution may be limited. For example, Garcia-Muniesa (2019) found that although individuals who had experienced downward social mobility during the 2008 Great Recession were more likely to support tax progressivity, the correlation between both variables was not homogeneous among all citizens, depending on people's social mobility beliefs. Specifically, citizens who had experienced downward social mobility but believed that their economic situations would improve in the near future did not show increased support for progressive taxation.

These results suggest that just the *belief* in the likelihood of socioeconomic advancement for advancement can be a powerful force for explaining why those at the bottom or middle socioeconomic status might not fully embrace redistribution policies (Garcia-Muniesa, 2019; Shepelak, 1989). In the same vein, psychology has highlighted the importance of subjective (vs. objective) reality in explaining human behavior, and how it can lead to significant consequences beyond objective reality (Adler et al., 2000; Asch, 1952; Castillo et al., 2022; Davidai et al., 2012; Willis et al., 2022).

Preferences for redistribution may therefore depend on subjective social mobility. More importantly, preferences for redistribution may be affected not only by experienced social mobility but also by individuals' beliefs about social mobility (Garcia-Muniesa et

al., 2019). However, very little attention has been paid to the role of mobility beliefs in affecting support for redistribution policies. Thus, this work aimed to investigate the relationship between mobility beliefs and attitudes toward redistribution policies, distinguishing between upward and downward social mobility beliefs.

Holding upward mobility beliefs may encourage people to maintain the *statu quo*, which may make them net achievers in the future. Thus, upward mobility beliefs may reinforce system-justifying ideologies, and research on system justification helps to understand these beliefs. According to system justification theory, "people are motivated to defend, justify, and bolster aspects of the status quo, including existing social, economic, and political systems, institutions, and arrangements" (Jost et al., 2015, p. 321). A particularly relevant type of legitimizing or hierarchy-enhancing belief is meritocracy (i.e., the myth that hardworking, personal ability, and worth allow individuals to succeed regardless of their circumstances; Goldthorpe, 2003). People who endorse meritocratic beliefs typically oppose to redistributive policies (García-Sánchez et al., 2020) and associate achievement expectations with individual responsibility (Kuppens et al., 2018), neglecting the role that social structure plays in the likelihood of success. Perhaps unsurprisingly, upward social mobility is often related positively to meritocracy (Day & Fiske, 2017; Mijs, 2022; Matamoros-Lima, Willis & Moya, 2023). Drawing from this evidence, it is possible that upward mobility beliefs increase meritocratic beliefs, thus decreasing attitudes toward redistribution.

Turning to downward social mobility beliefs, the potential psychological mechanisms that may explain their effects may be focused on the threats of losing their social status. For example, by decreasing their status, people may lose their health insurance and loss of financial resources to pay for necessities, such as clothing, food, and shelter. Existing literature has substantiated that exposure to risks stemming from

various forms of economic challenges stimulates individual demand for the expansion of social spending and public provision of welfare, even among the more well-off (Anderson & Pontusson, 2007; Margalit, 2011; Rehm, 2009; Rehm et al., 2012). Hacker et. al. (2013), for instance, found that Americans who worried about losing their income were more likely to support policies that buffered these risks than those who did not worry. Building on this research, it could be predicted that downward mobility beliefs would increase perceived personal economic risks, thus increasing attitudes towards redistribution.

Overview of the Current Research

Our aim was to investigate the relationship between beliefs about upward and downward social mobility and attitudes toward redistribution (Objective 1) and to test the mediating role of meritocracy and perceived economic threat in the relationship between upward and downward social mobility beliefs and attitudes toward redistribution (Objective 2). As such, we conducted three studies. Study 1 was cross-sectional and examined the relations among upward and downward social mobility beliefs, meritocratic beliefs, perceived personal economic risks, and attitudes toward redistribution. Using an experimental paradigm, in Studies 2 and 3, we tested the causal relationship between these variables.

The research was conducted in Italy and Spain, two countries with a similar culture, Gini Index, and economic situation (Organisation for Economic Co-operation and Development, 2022). However, the two countries show differences in redistributive policies. Although in both countries the richest group receives more public transfers than the poorest group, this gap is greater in the Italian context (Organisation for Economic Cooperation and Development, 2022). Therefore, Italian and Spanish samples allowed us

to explore support toward redistribution policies in similar contexts with different redistributive policies.

We conducted the analyses using R software (R Core Team, 2022). Preregistrations, data, code to reproduce analyses, materials, and supplementary material are available at https://osf.io/ybjks/?view_only=e71b2471e32a4e11a0d54947ebd9e613

Study 1

The goal of Study 1 was to investigate the relationship between upward and downward societal mobility beliefs and attitudes toward redistribution, as well as potential psychosocial mechanisms. Our preregistered hypotheses included the following (see bridging document in OSF):

Hypothesis 1: Upward societal mobility beliefs would be positively related with meritocratic beliefs (H1a) and negatively related with perceived personal economic risks (H1b) and support for redistribution (H1c).

Hypothesis 2: Downward societal mobility beliefs would be negatively related with meritocratic beliefs (H2a) and positively related with perceived personal economic risks (H2b) and support for redistribution (H2c).

Hypothesis 3: Meritocratic beliefs would mediate the relationship between upward societal mobility beliefs and attitudes toward redistribution (H3).

Hypothesis 4: Perceived personal economic risk would mediate the relation between downward societal mobility beliefs and attitudes toward redistribution (H4).

Method

Participants and Procedures

We collected data through a participant-recruiting company (i.e., NETQUEST). The final Spanish sample (N = 1536) consisted of 746 women and 790 men, with M_{age} = 48.41 (SD = 17.21; Table S1). The sample was stratified by quotas based on social class,

gender, age, and region of residence (as established by the Nielsen standards) following the distribution of the Spanish population stated by the National Statistics Institute of Spain.

A sensitive power analysis using *pwr* package (Champely, 2020) revealed that the sample permits the detection of an effect size of $r \geq 0.07$ (alpha level = .05, 80% power). The study received the approval of the University Ethics Committee. All participants provided informed written consent in accordance with the Declaration of Helsinki.

Measures

Attitudes Toward Redistribution Scale. The scale (García-Sánchez et al., 2022) is composed of four items to measure attitudes toward redistribution (e.g., "The government should impose higher taxes on those with higher incomes"; "The government has a responsibility to reduce the income gap between those who have more and those who have less"). Answers were provided on a 7-point Likert scale, ranging from 1 (*totally disagree*) to 7 (*totally agree*). Higher scores reflect positive attitudes toward redistribution ($\alpha_{Chronbach}$ = .81).

Bidimensional Social Mobility Beliefs Scale. In the present study, we used an abridged form of the bidimensional social mobility beliefs scale (Matamoros-Lima, Willis & Moya, 2023); fit indices from CFA in Table S2) including six items: three items (e.g., "In Spain, children often achieve a higher socio-economic status than the household in which they grew up"; $\alpha_{Chronbach}$ = .87) assessed upward societal mobility, and three items (e.g., "The majority of the Spanish population worsens in socioeconomic status over the course of their lives"; $\alpha_{Chronbach}$ = .84) measured downward societal mobility beliefs. Answers were provided on a 7-point Likert scale ranging from 1 (*totally disagree*) to 7 (*totally agree*). Higher scores reflect high upward/downward societal mobility beliefs.

Meritocratic Beliefs Scale. We used two items (Castillo et al., 2019) to measure descriptive meritocratic beliefs (i.e., "In Spain people are rewarded for their efforts" and "In Spain people get what they deserve"). Answers were provided on a 7-point Likert scale ranging from 1 (*totally disagree*) to 7 (*totally agree*). The mean between the two items for each participant was calculated ($\alpha_{Chronbach}$ = .77; $r_{meaninter\text{-}item}$ = .63) such that higher scores indicate high descriptive meritocratic beliefs.

Perceived Personal Economic Risk Scale. Two items of the perceived personal economic risk scale (Marjanovic et al., 2013) were used (i.e., "How you feel about your current financial situation: How uncertain do you feel?"; "How much do you feel at risk?"). Answers were provided on a 7-point Likert scale ranging from 1 (*not at all*) to 7 (*a great deal*). For each participant, ratings to the two items were averaged. Higher scores reflect high perceived personal economic risk ($\alpha_{Chronbach}$ = .88; $r_{meaninter\text{-}item}$ = .79).

Socio-demographics. Participants provided information about gender, age, educational attainment, occupation, income, subjective socioeconomic status (from 1 = *worst off* to 10 = *best off*; Adler et al., 2000), and political orientation (from 0 = *left* to 10 = *right*).

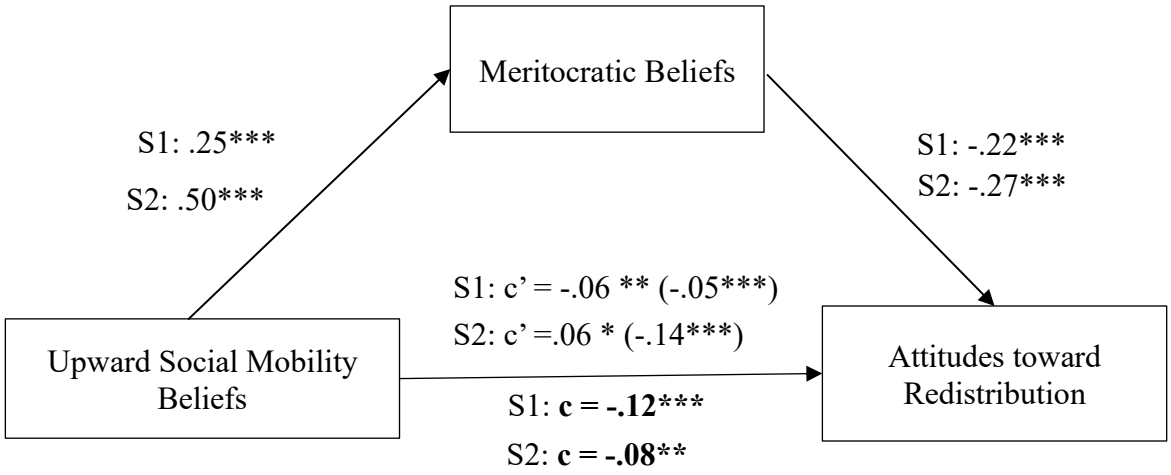
Results

Pre-registered Hypotheses

Zero-order correlations among study variables was performed; Table S3). Upward societal mobility beliefs correlated positively with meritocratic beliefs (r = .25, p < 0.001), and negatively with perceived personal economic risks (r = -.08, p < 0.001) and attitudes toward redistribution (r = -.12, p < 0.001). Moreover, downward societal mobility beliefs correlated negatively with meritocratic beliefs (r = -.10, p < 0.001), and positively with perceived personal economic risks (r = .19, p < 0.001) and attitudes toward redistribution (r = .15, p < 0.001). Therefore, Hypotheses 1 and 2 were confirmed.

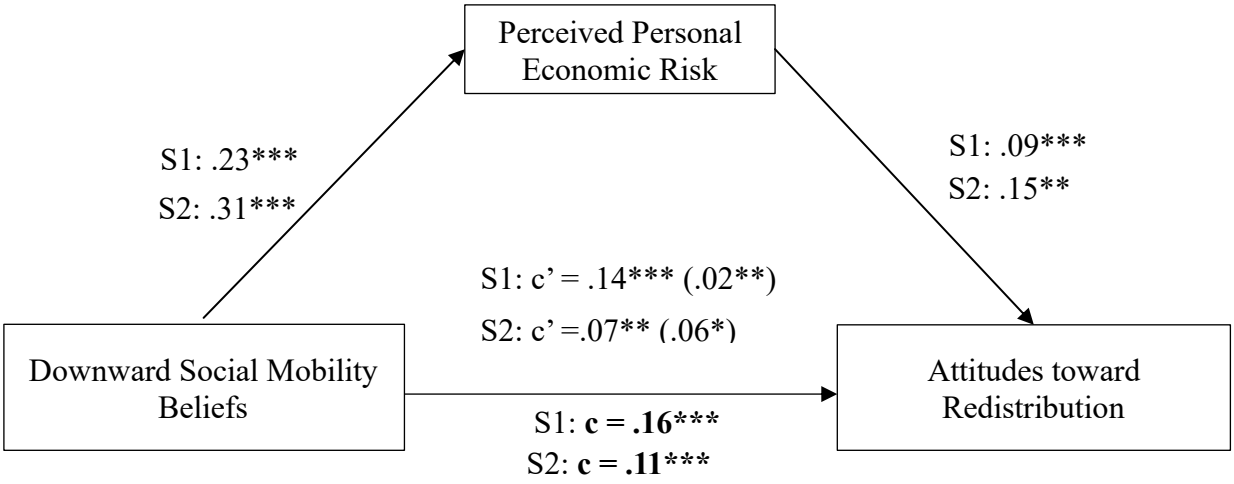
To test Hypothesis 3 and Hypothesis 4, two mediation analysis were performed (Model 4, bootstrapping 5.000 samples, 95% CI; Hayes, 2013) using *lavaan* package (Rosseel, 2012). First, we tested the indirect effect of upward societal mobility beliefs on attitudes toward redistribution through meritocratic beliefs (Figure 1). Results revealed a significant indirect effect of meritocratic beliefs (IE = -0.05, SE = 0.01, $p < 0.001$, 95% CI [-0.08, -0.04]). We then tested the indirect effect of beliefs about downward societal mobility on attitudes towards redistribution through perceived personal economic risks (Figure 2). Our results revealed a significant indirect effect of perceived personal economic risks (IE = 0.02, SE = 0.00, $p = 0.001$, 95% CI [0.01, 0.03]). Therefore, Hypotheses 3 and 4 were confirmed. Furthermore, the indirect effect of upward societal mobility beliefs (H3) was maintained even controlling for downward societal mobility beliefs, subjective socio-economic status, and political orientation (H3: IE = -0.02, SE = 0.00, $p < 0.001$, 95% CI [-0.04, -0.01]). Also, the indirect effect of downward societal mobility beliefs (H4) remained even controlling for upward societal mobility beliefs, subjective socio-economic status, and political orientation (H4: IE = 0.01, SE = 0.00, $p = 0.01$, 95% CI [0.00, 0.02]).

Figure 1. *Meritocratic Beliefs Mediate Effect of Upward Social Mobility Beliefs on Attitudes toward Redistribution.*



Note: Indirect effect in brackets. Total effect in bold; Study 1 (Spain); Study 2 (Italy); $^{**}p < 0.05$; $^{***}p < 0.001$. Bootstrap = 5000

Figure 2. *Perceived Personal Economic Risk Mediate Effect of Downward Social Mobility Beliefs on Attitudes toward Redistribution.*



Note: Indirect effect in brackets. Total effect in bold; Study 1 (Spain); Study 2 (Italy); $^{**}p < 0.05$; $^{***}p < 0.001$. Bootstrap = 5000

Discussion

Results from Study 1 suggest that upward and downward societal mobility beliefs are related in opposite ways with attitudes toward redistribution. In particular, when people believe it is likely to improve in the future their social position in the society they live in, they oppose redistributive policies but support them when they believe it is likely to get worse the social position.

In addition, Study 1 showed that upward societal mobility has an indirect effect on attitudes toward redistribution through meritocratic beliefs. That is, believing that one lives in a context where upward societal mobility is relatively high increases the endorsement of meritocratic beliefs, which, in turn, fosters negative attitudes toward redistribution. We also found that downward societal mobility beliefs have an indirect effect on attitudes toward redistribution through perceived personal economic risks may be a reliable mediator of the effect of. In other words, believing that one lives in a context where downward societal mobility is very likely increases concerns for personal economic risks, which, in turn, increase support for redistribution policies.

Study 2

The correlational nature of Study 1 prevented us from assuming a causal direction of the emerged relationships. Therefore, we conducted an experimental study in which societal mobility beliefs were manipulated (see bridging document in OSF). Our hypotheses were that upward societal mobility has an indirect effect on attitudes toward redistribution through meritocratic beliefs (H1); conversely, downward societal mobility beliefs have an indirect effect on attitudes toward redistribution through perceived personal economic risks (H2).

Method

Participants and Procedures

Italian participants were contacted through a participant-recruiting company and different social networks (e.g., Facebook, Twitter). After granting informed consent, 329 participants completed an online questionnaire. Once the preregistered exclusion criteria were applied, the final sample included 301 participants (M_{age} = 32.24, *SD* = 9.97), and 163 were females (135 male and 3 others; Table S4).

We calculated a priori the minimum sample size needed (with alpha level = .05 and power of 0.80) to detect the indirect effects based on data from a previous study. A Monte Carlo simulation (Schoemann et al., 2017) showed that we needed a minimum sample size of 300 participants (150 per condition). The IRB of the Psychology Department of University of Campania Luigi Vanvitelli approved the procedure and materials of the study. All participants provided informed written consent in accordance with the Declaration of Helsinki. All measures used were translated into Italian.

Measures[4]

Societal Mobility Manipulation. Societal mobility was manipulated using an adaptation of the Bimboola Paradigm (Jetten et al., 2015; Sánchez-Rodríguez et al., 2019) developed by Melita and collaborators (2023a). However, unlike the original paradigm, the level of economic inequality remained constant in all conditions (high inequality). Participants were informed that they would become part of a (fictitious) society called Bimboola, which was divided into five income groups. All participants also learned that they belonged to the middle-income group (Group 3). Then, respondents were allowed to

[4] The measures in Study 1 were taken from a national Spanish sample study in which variables of interest for different lines of research were included. For this reason, we use different scales (attitudes towards redistribution and meritocratic beliefs), and all scales present a lower number of items with respect to the original scales.

choose, from a subset of goods, a house and a car they could afford to start their new life. Next, participants were randomly allocated to one of two experimental conditions (upward and downward societal mobility). In the upward societal mobility condition, participants learned that, in their lifetime, most people in Group 3 had a high probability to improve their socioeconomic position. In the downward societal mobility condition, it was reported that, in their lifetime, most people in Group 3 had a high probability of worsening their socioeconomic position.

In the second part of the study, participants completed two manipulation checks asking to what extent they perceived upward or downward societal mobility (i.e., "People in Group 3 are likely to improve their socioeconomic position in Bimboola" and "People in Group 3 are likely to worsen their socioeconomic position in Bimboola"). Answers were provided on a 7-point Likert scale ranging from 1 (*totally disagree*) to 7 (*totally agree*). Then, they completed the following scales adapted to Bimboola (see materials in OSF), and provided socio-demographics.

Attitudes Toward Redistribution Scale. The scale (Dawtry et al., 2015) includes four items aimed at measuring attitudes toward redistribution (e.g., **"**The government should redistribute wealth through heavy taxes on the rich"). Answers were provided on a 7-point Likert scale ranging from 1 (*totally disagree*) to 7 (*totally agree*). A total score was calculated by averaging responses on the four items. Higher values of the scores reflect more positive attitudes toward redistribution ($\alpha_{Chronbach}$ = .68).

Meritocracy Beliefs Scale. The scale (García-Sánchez et al., 2022) is composed of six items aimed at assessing meritocratic beliefs (e.g., "People who work hard do achieve success," "If people work hard they do get what they want") on 7-point Likert scales ranging from 1 (*totally disagree*) to 7 (*totally agree*). We calculated a meritocratic

beliefs index by averaging the responses to the six items, such that higher values reflect a greater endorsement of meritocratic beliefs ($\alpha_{Chronbach}$ = .93).

Perceived Personal Economic Risks Scale. The scale (Marjanovic et al., 2013) includes five items assessing perceived personal economic risks (e.g., "How you feel about your current financial situation: How uncertain do you feel?"; "How much do you feel at risk?"). Answers were provided on a 5-point Likert scale ranging from 1 (*not at all*) to 5 (*a great deal*). Scores of perceived personal economic risks were calculated by averaging participants' responses to the five items of the scale. Higher scores indicate higher perceived personal economic risks ($\alpha_{Chronbach}$ = .91).

Socio-demographics. Participants provided information about gender, age, marital status, educational attainment, occupation, income, subjective socioeconomic status (from 1 = *worst off* to 10 = *best off*; Adler et al., 2000), and political orientation (on a scale ranging from 1 = *far-left* to 7 = *far-right*).

Results

Preliminary Analyses

Zero-order Correlations. As shown in Table S5, mobility condition (0 = downward societal mobility; 1 = upward societal mobility) correlated positively with meritocratic beliefs (r = 0.67, p < 0.001), and negatively with perceived personal economic risk (r = -0.72, p < 0.001) and attitudes toward redistribution (r = -0.20, p < 0.001).

Manipulation Checks. We investigated whether the experimental manipulation had worked as intended using *rstatix* package (Kassambara, 2022). Participants in the upward societal mobility condition perceived higher upward mobility (M = 6.41; SD = 0.92) compared to the downward societal mobility condition (M = 2.58; SD = 1.42), t(299) = -21.84, p < 0.001, d = -2.52, 95% CI [-3.08, -2.07]. By contrast, participants in

the downward societal mobility condition perceived higher downward mobility (M = 5.97; SD = 1.41) compared to the upward mobility condition (M = 2.85; SD = 1.77), $t(327) = 20.79$, $p < 0.001$, $d = 2.39$, 95% CI [1.95, 2.96].

Attitudes toward Redistribution. A two-tailed *t-test* was performed to investigate the effects of experimental conditions (upward vs. downward) on attitudes toward redistribution. A significant difference emerged between participants in the upward (M = 5.17; SD = 1.04) and downward societal mobility condition (M = 5.57; SD = 0.88) on attitudes toward redistribution, $t(288.53) = 3.66$, $p < 0.001$, $d = 0.42$, 95% CI [0.20, 0.66].

Pre-registered Hypotheses

To test Hypotheses 1 and 2, two mediation analysis (Model 4, bootstrapping 5.000 samples, 95% CI; Hayes, 2013) were conducted using *lavaan* package (Rosseel, 2012). To test the effects of upward and downward mobility separately, the manipulation checks of the two experimental conditions (upward and downward societal mobility condition) were entered as predictors. First, we tested the indirect effect of upward societal mobility on attitudes toward redistribution though meritocratic beliefs (Figure 1). A significant indirect effect of upward societal mobility on attitudes toward redistribution, through meritocratic beliefs was found (IE = -0.14, SE = 0.02, $p < 0.001$, 95% CI [-0.19, -0.08]). We then tested the indirect effect of downward societal mobility on attitudes towards redistribution through perceived personal economic risks (Figure 2). Again, a significant indirect effect of downward societal mobility on attitudes towards redistribution through perceived personal economic risks emerged (IE = 0.04, SE = 0.02, $p = 0.02$, 95% CI [0.00, 0.09]).

Exploratory Analyses

To control the effects of upward and downward societal mobility beliefs on attitudes toward redistribution, we conducted two mediation analysis using condition (0 = downward societal mobility; 1 = upward societal mobility) as a predictor variable. Mobility condition had an indirect effect on attitudes toward redistribution through meritocratic beliefs (H1: IE = -0.50, SE = 0.10, $p < 0.001$, 95% CI [-0.71, -0.31]) and perceived personal economic risk (H2: IE = -0.34, SE = 0.11, $p = 0.004$, 95% CI [-0.57, -0.10]). The effect of upward societal mobility condition (H1) was significant even after controlling for participants' subjective socio-economic status and political orientation (H1: IE = -0.41, SE = 0.09, $p < 0.001$, 95% CI [-0.61, -0.22]). Similarly, the indirect effect of downward societal mobility condition (H2) was significant even controlling for subjective socio-economic status and political orientation (H2: IE = -0.34, SE = 0.11, $p = 0.003$, 95% CI [-0.57, -0.12]).

Discussion

Results of Study 2 showed a significant difference on attitudes toward redistribution depending on the type of activated beliefs about social mobility: In the downward societal mobility condition, participants manifested more positive attitudes toward redistribution than those in the upward societal mobility condition. Importantly, through an experimental design, in Study 2 we found that meritocratic beliefs may be a reliable mediator of the effect of upward societal mobility on attitudes toward redistribution, whereas perceived personal economic risks may be a mediator of the effect of downward societal mobility on attitudes toward redistribution.

However, one limitation of this study was that we did not include a control group. Therefore, the control (i.e., societal immobility) condition was added in Study 3. Study 3 allowed us to i) further test the role of perceived personal economic risks in explaining

the relation between downward mobility beliefs and support for redistribution, and ii) investigate which of the two types of mobility (upward or downward) affected attitudes toward redistribution or whether both types of social mobility significantly affected attitudes toward redistribution.

Study 3

The goal of Study 3 was to replicate the results of previous studies with an experimental design including three conditions (upward societal mobility, societal immobility, downward societal mobility). Our preregistered hypotheses were the following:

Hypothesis 1: Positive attitudes toward redistribution would be lower in the upward social mobility condition compared to the immobility condition (H1a) and to the downward social mobility condition (H1b); positive attitudes toward redistribution would be higher in the downward social mobility condition compared to the immobility condition (H1c).

Hypothesis 2a: We expected an indirect effect of upward social mobility (vs. downward condition) on attitudes toward redistribution through meritocratic beliefs. Specifically, we predicted that upward social mobility would increase meritocratic beliefs (Path a) and that meritocratic beliefs would reduce attitudes toward redistribution (Path b).

Hypothesis 2b: We expected an indirect effect of upward social mobility (vs. immobility condition) on attitudes toward redistribution through meritocratic beliefs. Specifically, we predicted that upward social mobility would increase meritocratic beliefs (path a), which, in turn, would decrease attitudes toward redistribution (Path b).

Hypothesis 3a: We expected an indirect effect of downward social mobility (vs. upward condition) on positive attitudes toward redistribution through perceived personal

economic risks. Specifically, we predicted that downward social mobility would increase perceived personal economic risks (Path a), which, in turn, would increase attitudes toward redistribution (Path b).

Hypothesis 3b: We expected an indirect effect of downward social mobility (vs. immobility condition) on attitudes toward redistribution through perceived personal economic risks. Specifically, we predicted that downward social mobility would increase perceived personal economic risks (Path a) and that perceived personal economic risks would increase attitudes toward redistribution (Path b).

Method

Participants and Procedures

Spanish participants were contacted via a university email list. We drew a prize of €50 among all participants. We calculated the minimum sample size needed (with alpha level = .05 and power of 0.80) to detect the indirect effects based on data from a previous study. A Monte Carlo simulation (Schoemann et al., 2017) showed that we needed a minimum sample size of 450 participants (150 per condition). After granting informed consent, 783 participants completed a Qualtrics questionnaire. Once the preregistered exclusion criteria were applied, the final sample included 638 participants (M_{age} = 24.06, *SD* = 8.27), and 455 were females (176 male and 7 others; Table S4). The study received approval from the University Ethics Committee.

Procedure and Materials

Procedure and measures of Study 3 were virtually identical to Study 2, with the exception that participants were randomly assigned to one of three experimental conditions: upward societal mobility, downward societal mobility, or societal immobility. In the societal immobility (control) condition, participants were informed that, in their lifetime, most people in Group 3 (the group they were assigned) had a high probability of

remaining in the same income group. As in Study 2, participants completed the meritocratic beliefs scale (García-Sánchez et al., 2022; $\alpha_{Chronbach}$ = .93), the perceived personal economic risks scale (Marjanovic et al., 2013; $\alpha_{Chronbach}$ = .92), the attitudes toward redistribution scale (Dawtry et al., 2015; $\alpha_{Chronbach}$ = .69), and provided socio-demographics.

Results

Preliminary Analyses

Manipulation Checks. Participants in the downward societal mobility condition perceived higher downward mobility (M = 5.97; SD = 1.31) than participants in the upward societal mobility (M = 2.06; SD = 1.27) and societal immobility condition (M = 2.15; SD = 1.34), $F(2,635) = 622.57$, $p < 0.001$, $\eta^2 = 0.66$, 95% CI [0.63, 1.00]. Moreover, participants in the societal immobility condition perceived higher societal immobility (M = 6.12; SD = 1.32) than participants in the upward (M = 2.84; SD = 1.70) and downward societal mobility condition (M = 2.97; SD = 1.76), $F(2,635) = 284.41$, $p < 0.001$, $\eta^2 = 0.47$, 95% CI [0.43, 1.00]. Finally, participants in the upward societal mobility perceived greater upward social mobility (M = 6.23; SD = 1.04) compared to downward societal mobility (M = 2.35; SD = 1.58), and societal immobility condition (M = 2.36; SD = 1.55); $F(2,635) = 537.76$, $p < 0.001$, $\eta^2 = 0.62$, 95% CI [0.59, 1.00].

Pre-registered Hypotheses

Attitudes toward Redistribution: To test Hypothesis 1, an unifactorial ANOVA was performed adjusting for Bonferroni (*rstatix* package; Kassambara, 2022). No significant differences emerged (downward social mobility: M = 5.62; SD = 1.08; upward social mobility: M = 5.49; SD = 1.07; social immobility: M = 5.59; SD = 1.06), $F(2,635) = 0.92$, $p = 0.39$, $\eta^2 = .003$, 95% CI [0.00, 1.00].

To test Hypotheses 2 and 3, we conducted four mediation analysis (Model 4, bootstrapping 5.000 samples, 95% CI; Hayes, 2013). Given that mobility condition was a categorical variable with three levels, we created the contrast variables (i.e., 1 = upward vs. downward; 2 = upward vs. immobility; 3 = downward vs. immobility; Table S8; Hox, 2017). Then, we tested the indirect effect of upward mobility condition (H2a: vs. downward condition; H2b: vs. immobility condition) on attitudes toward redistribution thought meritocratic beliefs. A significant indirect effect of upward mobility condition emerged, both when compared to the downward mobility (H2a: IE = -0.22, SE = 0.02, $p < 0.001$, 95% CI [-0.28, -0.17]) and societal immobility condition (H2b: IE = -0.25, SE = 0.03, $p < 0.001$, 95% CI [-0.31, -0.19]). Finally, we tested the indirect effect of downward mobility condition (H3a: vs. upward condition; H3b: vs. immobility condition) on attitudes toward redistribution though perceived economic risks. Results showed a significant indirect effect of downward mobility condition, both when compared to the upward mobility (H3a: IE = -0.12, SE = 0.03, $p < 0.001$, 95% CI [-0.18, -0.05]) and immobility condition (H3b: IE = -0.11, SE = 0.02, $p < 0.001$, 95% CI [-0.17, -0.06]). A robustness check showed that all indirect effects remained even controlling for participants' subjective socio-economic status and political orientation: H2a: IE = -0.14, SE = 0.02, $p < 0.001$, 95% CI [-0.18, -0.09]; H2b: IE = -0.15, SE = 0.02, $p < 0.001$, 95% CI [-0.20, -0.11]; H3a: IE = -0.10, SE = 0.02, $p < 0.001$, 95% CI [-0.15, -0.05]; H3b: IE = -0.09, SE = 0.02, $p < 0.001$, 95% CI [-0.14, -0.05].

Discussion

We did not replicate the difference between upward and downward societal mobility on attitudes toward redistribution found in Study 2 (H1). This could be due to the high correlation emerged between attitudes towards redistribution and political orientation. When we controlled the political orientation effect, we found a significant

difference in attitudes toward redistribution between the upward and downward mobility conditions[5].

Although results from Study 3 did not support H1, in line with H2 and H3, we found the same indirect effect emerged in Studies 1 and 2. Therefore, Study 3 confirmed that meritocratic beliefs were a significant mediator of the relation between upward societal mobility (vs. downward vs. immobility condition) and attitudes toward redistribution. On the contrary, perceived personal economic risks were a significant mediator of the relation between downward societal mobility (vs. upward vs. immobility condition) and attitudes toward redistribution.

General Discussion

The aim of the present research was to investigate the relationship between societal mobility beliefs and attitudes toward redistribution considering upward and downward social mobility beliefs. Across three studies (one cross-sectional and two experimental) in different countries (Italy and Spain), we found that upward societal mobility beliefs were negatively related to attitudes toward redistribution, while downward societal mobility beliefs were positively related. We also found that different psychological mechanisms explained these effects. That is, although meritocratic beliefs explained the effect of upward societal mobility beliefs on redistribution, perceived personal economic risks explained the effect of downward societal mobility.

The present findings support recent research showing that upward and downward mobility may be considered independent constructs (Browman et al., 2021; Matamoros-Lima, Willis & Moya, 2023) with different consequences (Melita, Gobel et al., 2023),

[5] ANCOVA adjusting for Bonferroni showed a significant difference in attitudes toward redistribution between the downward and upward mobility conditions, $t(628) = 2.54$, $p = 0.03$, $d = .24$, 95% CI [0.05, 0.44].

thus expanding on the evidence on social mobility beliefs and their consequences (Davidai & Wienk, 2021; Matamoros-Lima, Willis & Moya, 2023; Melita, Gobel et al., 2023).

Another contribution of this work concerns the focus on people's beliefs (Alesina & La Ferrara, 2005; Alesina et al., 2018; Benabou & Ok, 2001). Previous studies have shown that experienced upward and downward social mobility may affect people's support toward redistribution polices (Mérola & Helgason, 2016; Schmidt, 2010). However, recent results (García-Muniesa, 2019) have suggested that social mobility beliefs, even controlling by experienced social mobility, may be an important predictor of attitudes toward redistribution. Consistently, we demonstrated that the *beliefs* people hold about future socioeconomic status mobility in their background increasing or decreasing— are crucial in shaping attitudes toward redistributive policies.

Various types of social mobility beliefs have the potential of triggering different consequences on people's support to redistribution policies. People who believe that it is likely to improve the social position in the future in the society they live in, show more negative attitudes toward redistribution policies. Conversely, and more importantly, our findings show that when people believe that it is easy to worsen their conditions—to move down to lower social classes—they tend to perceive higher economic risks, and this leads to more positive attitudes toward redistribution (Anderson & Pontusson, 2007; Margalit, 2011; Rehm, 2009; Rehm et., 2012).These results help to understand why, in contexts of economic instability (e.g., 2008 financial crisis, COVID-19 crisis), people are more likely to support redistributive measures (Margalit, 2013; Mijs et al., 2022; Oliveira, 2014).

Self-interest theory may explain this cognitive process (Durante & Putterman, 2014). People with high upward mobility beliefs would not support redistributive policies in anticipation of a potential class promotion toward higher class. Conversely, people

with high downward mobility beliefs would support redistributive policies (e.g., progressive taxation, minimum living income; Piketty, 2015) in anticipation of a potential decrease toward a lower class.

However, other psychological mechanisms beyond self-interest may explain the relationship among mobility beliefs and the support for redistributive policies (Corneo & Grüner, 2002; Fong, 2001), such as system-justifying ideologies (García-Sánchez et al., 2020; Jost & Hunyady, 2005; Jost et al., 2015; Matamoros-Lima, Willis & Moya, 2023), especially when people believe in upward mobility. Thus, when people believe that it is easy to improve the living conditions —to move up to higher social classes— in the society they live in they tend to endorse system-justifying ideologies, such as meritocratic beliefs, to a greater extent, and this fosters more negative attitudes toward redistribution. These results have important implications as they contribute to explaining why, in meritocratic contexts (e.g., following the American Dream in the United States; Chetty et al., 2017), people tend more toward opposing redistributive policies (Corneo & Grüner, 2002).

The present research may also have implications from an applied point of view. Our findings show that people were unlikely to support redistribution if they believed that their future socioeconomic status would improve. Therefore, it seems clear that any communication intended to promote support for redistribution policies in the population will be more effective in creating positive engagement by shifting people's attention to the evidence that in countries with greater economic inequality the degree of upward social mobility is lower (Browman et al., 2022; Connolly et al., 2019; Corak, 2013) and that in these contexts ability and effort are not sufficient to put some people ahead of others in society. In this way, it may become easier promoting the idea that things may get worse, and that a change toward a more egalitarian society is needed.

Given that this is the first research testing the role of upward and downward mobility beliefs in attitudes towards redistribution, we are aware of possible limitations. For instance, in Studies 2 and 3 we did not manipulate the mediating variables. This limits the conclusion we can draw, and therefore, the proposed mechanisms cannot be interpreted from such as causal mediation (e.g., Fiedler et al., 2011; Pirlott & MacKinnon, 2016; Rohrer et al., 2022). Future studies should therefore replicate the effects of our proposed mechanisms also by manipulating meritocracy beliefs and perceived personal economic risks to determine causal mediation.

Our main goal was to compare the effects of upward and downward mobility beliefs (based on the trajectory) on attitudes toward redistribution. Since other types of mobility could explain why people do or do not support redistributive policies (e.g., Merola & Helgason, 2016), future studies should focus on other types of mobility beliefs and on how these beliefs might act simultaneously (Davidai & Wienk, 2021), especially when we know that beliefs about personal mobility are greater than beliefs about societal mobility (Matamoros-Lima, Willis et al., 2023). Besides this, it will also be important to replicate these models in various contexts, as well as study whether the effects we found are persistent over time. Additionally, future researchers could extend the current findings by exploring moderating variables of the effect of mobility on redistribution. In this way, possible variables that reduce the effect of beliefs in upward mobility on opposition to redistributive policies could be identified.

Some research has pointed out that social mobility effects may be due to citizens' socioeconomic status rather than a social mobility beliefs (Ciccolini & Härkönen, 2023; Van der Wal et al., 2017). The person's social position on the social ladder (e.g. position 3 out of 10) and/or the destination position (e.g. destination position 8 out of 10) may be confused with the social mobility effects per se (i.e., movement from position 3 to

position 8 out of 10). Future studies should attempt to replicate the effects of the present research using formulations in which the effects of destination class position are controlled (e.g., Luo, 2022 for the Mobility Contrast Model; or Sobel, 1981 for the Diagonal Mobility Model). Also, redistribution can refer to various processes associated with 'reducing' the gap between the rich and the poor. In addition, some people do not necessarily want to redistribute but rather promote social mobility and equity (e.g., by investing in better education). In our studies, we used measures of redistribution that refer to general policies. However, some studies find divergences between general and specific redistribution averages (Alesina et al., 2018). That is, some people might agree with some measures but not with others. Future studies should address this conjecture and investigate the relationship between upward and downward societal mobility beliefs and attitudes toward redistribution using different measures.

Despite these limitations, for the first time our research presents evidence for (a) the important role that societal mobility beliefs may play in better understanding why some people support redistributive policies and others do not; and (b), importantly, how different mechanisms might explain support (or not) for redistributive policies. These results have important implications for the design of policies to reduce economic inequality.

CAPÍTULO FINAL

FINAL CHAPTER

Capítulo 8

Discusión General

En la presente tesis doctoral se han estudiado las creencias en la movilidad social y algunas de sus consecuencias psicosociales. En los Capítulos 5, 6, y 7 intentamos dar respuestas a las preguntas de investigación derivadas de nuestro objetivo general. En líneas generales, en el Capítulo 5 encontramos que las personas en España no perciben con exactitud la movilidad social económica real existente. Además, encontramos que, en España, las personas tienen creencias pesimistas sobre la movilidad social existente en el país (i.e., movilidad societal), y optimistas sobre su propia movilidad social futura (i.e., movilidad personal). También, encontramos que las creencias meritocráticas no explican ni las creencias en la movilidad societal ni personal de las personas españolas. En el Capítulo 6 diseñamos un instrumento de medida para estudiar de manera independiente las creencias en la movilidad societal ascendente y descendente. Finalmente, en el Capítulo 7 encontramos efectos contrapuestos de la movilidad societal ascendente (negativo) y descendente (positivo) sobre las actitudes hacia la redistribución. Además, mostramos que la relación entre los dos tipos de movilidad y las actitudes hacia la redistribución puede explicarse a través de diferentes mecanismos.

A continuación, se llevará a cabo una descripción más detallada de los principales resultados obtenidos en los trabajos empíricos (ver Tabla 8.1). Los primeros apartados se plantean como respuestas a las preguntas de investigación planteadas. Una vez abordado los resultados, presentaremos algunas de las implicaciones de estos resultados, comentaremos sus limitaciones y discutiremos posibles futuras líneas de investigación. Por último, se finalizará con algunas de las conclusiones obtenidas.

Tabla 8.1.

Resumen de las preguntas de investigación, objetivos y respuestas de la tesis doctoral

Objetivo General: Estudiar las creencias en la movilidad social y algunas de sus consecuencias psicosociales			
Preguntas de Investigación (PI)	**Objetivos Específicos (OE)**	**Capítulo (Estudio)**	**Respuesta**
1. ¿Se corresponden las creencias en la movilidad social de las personas en España con la movilidad social real?	1. Determinar en qué medida las personas en España perciben con exactitud la movilidad social real	Capítulo 5 (Estudio 1)	No. Las personas españolas tienen creencias pesimistas sobre la movilidad económica real existente en España.
2. ¿Existen diferencias entre las creencias en la movilidad personal y societal?	2. Examinar si existen diferencias en la intensidad de las creencias en la movilidad personal y societal	Capítulo 5 (Estudio 2)	Sí. Las personas españolas tienen creencias más optimistas sobre su propia movilidad que sobre la movilidad societal existente en España.
3. ¿Afectan las creencias meritocráticas a las creencias en la movilidad social?	3. Estudiar si las creencias meritocráticas afectan a las creencias en la movilidad personal y societal	Capítulo 5 (Estudio 2)	No. Las creencias meritocráticas no afectan ni a la movilidad social intrageneracional e intergeneracional personal ni societal.
4. ¿Pueden considerarse constructos independientes las creencias en la movilidad social ascendente y descendente?	4. Diseñar un instrumento que permita discriminar entre las creencias en la movilidad ascendente y descendente	Capítulo 6 (Estudio 1 y 2)	Sí. Las creencias en la movilidad societal ascendente y descendente pueden ser considerados constructos independientes.
5. ¿Afectan de igual modo las creencias en la movilidad social ascendente y descendente a las actitudes hacia la redistribución de las personas?	5. Analizar el efecto de la movilidad social ascendente y descendente sobre las actitudes hacia la redistribución	Capítulo 7 (Estudio 1, 2 y 3)	No. Las creencias en la movilidad societal ascendente tiene un efecto negativo sobre las actitudes hacia la redistribución, mientras que la descendente un efecto positivo.
6. ¿Qué mecanismos pueden explicar el efecto de las creencias en la movilidad social ascendente y descendente sobre las actitudes hacia la redistribución?	6.1. Examinar si las creencias meritocráticas median el efecto de las creencias en la movilidad social ascendente sobre las actitudes hacia la redistribución; 6.2. Examinar si el riesgo económico percibido media el efecto de las creencias en la movilidad social descendente sobre las actitudes hacia la redistribución	Capítulo 7 (Estudio 1, 2 y 3)	Las creencias meritocráticas median la relación entre las creencias en la movilidad societal ascendente y las actitudes hacia la redistribución; en cambio, el riesgo económico percibido media el efecto de las creencias en la movilidad societal descendente sobre las actitudes hacia la redistribución.

8.1 Preguntas de investigación 1, 2 y 3

¿Se corresponden las creencias en la movilidad social de las personas en España con la movilidad social real? (P1)

En el Estudio 1 del Capítulo 5 examinamos en qué medida las personas en España perciben con exactitud la movilidad social real (OE1). Los datos referentes a la movilidad social económica real en España fueron extraídos de Fundación Felipe González en colaboración con la Fundación Cotec (Llaneras et al., 2020). Para medir las creencias en la movilidad social creamos un indicador de movilidad societal intergeneracional percibida utilizando un periodo de años similar al de nuestro indicador de movilidad social económica real (26-32 años). En este indicador calculamos la diferencia entre el quintil de renta de origen de una persona nacida en el quintil más pobre con el quintil de destino. Para ello, utilizamos una escala utilizada para estimar la movilidad societal intergeneracional en estudios anteriores (Alesina et al., 2018; Davidai, 2018).

Los resultados encontrados indican que existe una visión pesimista sobre la movilidad social existente en España (i.e., movilidad societal). En concreto, las personas españolas creen que existe un porcentaje menor al real de personas pobres (i.e., pertenecientes al quintil de ingresos más bajo) que se moverán hacia otros quintiles de ingresos (OE1). En otras palabras, las personas participantes han subestimado la movilidad societal.

Estos hallazgos son consistentes con la literatura previa, la cual sostiene que a las personas les resulta difícil estimar con precisión la movilidad social económica real (Alesina et al., 2018; Duru-Bellat & Kieffer, 2008; Jaime-Castillo & Marqués-Perales, 2014), y que las creencias en la movilidad social —movilidad social subjetiva— no suele coincidir con la movilidad social real existente —movilidad objetiva— (Berger & Engzell, 2020; Gugushvili, 2016; Kelley & Kelley, 2009). Además, nuestros resultados también apoyan la hipótesis sobre las diferencias transculturales en las percepciones de la movilidad social planteada por Alesina

y colaboradores (2018). Esto es, las personas en los Estados Unidos sobreestiman la movilidad económica social real (e.g., ver Cheng & Wen, 2019; Davidai & Gilovich, 2015a; Kraus & Tan, 2015), mientras que los europeos (Francia, Italia, Suecia y el Reino Unido) tienden a subestimarla.

No obstante, aunque nuestros resultados son consistentes con gran parte de las investigaciones que han estudiado la comparación entre la movilidad (económica) objetiva y las creencias en la movilidad social (e.g., ver Alesina et al., 2018) van en la dirección opuesta a los resultados del estudio llevado a cabo por Jaime-Castillo y Marqués-Perales (2014) en el contexto español. Estas diferencias podrían estar señalando algunas de las cuestionas que ya han sido señaladas en los capítulos teóricos: la dificultad a la hora de operacionalizar el constructo debido a su multidimensionalidad.

¿Existen diferencias entre las creencias en la movilidad personal y societal? (P2)

En el Estudio 2 del Capítulo 5 examinamos si existen diferencias en la intensidad de las creencias en la movilidad personal y societal (OE2). En el Estudio 1, encontramos que las personas en España tienen una visión pesimista de la movilidad existente en el país (i.e., movilidad societal). Los resultados del Estudio 2 muestran que, esta visión pesimista sobre la movilidad societal, sólo se produce cuando los españoles piensan en los demás, no cuando piensan en sí mismos (i.e., movilidad personal). Además, esto sucede independientemente de si pensaban en su propia movilidad futura (movilidad personal intrageneracional) o en la movilidad de sus hijos (movilidad personal intergeneracional).

Estos resultados apuntan en la misma dirección que diferentes investigaciones previas sobre la dualidad existente entre el optimismo personal (McKenna et al., 1993; Mezulis et al., 2004; Robertson, 1977; Sharot, 2011) y el pesimismo social (Galdi et al., 2020). En el caso de las creencias en la movilidad social, las personas parecen tener una visión optimista de su propia

movilidad social (i.e., movilidad personal), pero una visión pesimista sobre la movilidad social de otras personas en su país (i.e., movilidad societal).

¿Afectan las creencias meritocráticas a las creencias en la movilidad social? (P3)

Una posible explicación del sesgo optimista de la movilidad personal encontrado en el Estudio 2 del Capítulo 5 podría estar relacionada con el egocentrismo y el focalismo de las personas (Kruger, 1999; Kruger & Burrus, 2003; Windschitl et al., 2003). Por ejemplo, al estimar la probabilidad de tener un resultado favorable, los individuos pueden inclinarse a centrarse únicamente en sus propias posibilidades de experimentar el suceso y descuidar considerar adecuadamente la probabilidad de que otra persona experimente el mismo suceso. Esta tendencia egocéntrica puede llevar a predicciones sesgadas y excesivamente optimistas sobre la probabilidad de un resultado positivo.

Asimismo, otras variables como la creencia meritocrática de que el trabajo duro y el talento permite a los individuos tener éxito, y ascender en la escala social, independientemente de sus circunstancias, podría estar relacionada (Mijs, 2021). Por ejemplo, en gran parte de los países occidentales la mayoría de las personas creen que la jerarquía social es un reflejo de las recompensas meritocráticas al trabajo duro y el esfuerzo (Mijs 2018). Por este motivo, nos propusimos, en el Estudio 2 del Capítulo 5, estudiar si las creencias meritocráticas afectan a las creencias en la movilidad personal y societal (OE3).

En cuanto a la capacidad predictiva de las creencias meritocráticas, y en contra de nuestras predicciones, no encontramos una relación positiva significativa entre las creencias meritocráticas y las creencias en la movilidad personal y societal. En el Estudio 2, las creencias meritocráticas predijeron la movilidad personal intrageneracional, sólo después de controlar los factores sociodemográficos, las variables ideológicas, la desigualdad percibida y el optimismo disposicional. Esto resultados podrían deberse al instrumento utilizado para medir las creencias en la movilidad social.

8.2 Pregunta de investigación 4

¿Pueden considerarse constructos independientes las creencias en la movilidad social ascendente y descendente? (P4)

A lo largo de la literatura, se han utilizado diferentes instrumentos de medición para medir los diferentes tipos de movilidad social (e.g., Alesina et al., 2018; Browman et al., 2017; Davidai & Gilovich, 2015a; Gimpelson & Monusova, 2014; Kraus et al., 2015; Mijs et al., 2022; Yuan & Li, 2019). Como ha sido expuesto en el Capítulo 2, estas medidas tienen importantes limitaciones metodológicas (e.g., sesgos perceptivos, dificultad para contestarlas), y teóricas (i.e., no contemplan las diferentes aproximaciones teóricas al estudio de la movilidad, por ejemplo: movilidad ascendente vs. descendente). Teniendo en consideración este vacío sobre los instrumentos de medida existentes en la literatura, nos propusimos diseñar un instrumento que permita discriminar entre las creencias en la movilidad ascendente y descendente (OE4).

Los resultados de los Estudios 1 y 2, del Capítulo 6, mostraron que la escala bidimensional de creencias en la movilidad social (en inglés, BSMBS) presenta diferentes fuentes de evidencia de fiabilidad y validez. Además, también demostramos que la BSMBS discrimina entre dos tipos de creencias en la movilidad social según su trayectoria: ascendente y descendente. En todas las correlaciones con los diferentes constructos analizados, la movilidad social ascendente mostró efectos positivos para las actitudes hacia la desigualdad, creencias meritocráticas y justificación del sistema económico, y negativos para la ansiedad por el estatus. Por el contrario, la movilidad descendente mostró el resultado opuesto para cada una de estas relaciones. Estos resultados coinciden con otros resultados que sugieren que ambos tipos de movilidad (ascendente y descendente) podrían considerarse constructos relativamente independientes (Browman et al., 2021; Davidai & Gilovich, 2015b).

8.3 Preguntas de investigación 5 y 6

¿Afectan de la misma manera las creencias en la movilidad social ascendente y descendente a las actitudes hacia la redistribución de las personas? (P5)

En el Capítulo 6, mostramos que las creencias en la movilidad societal ascendente y descendente pueden considerarse constructos independientes, con diferentes consecuencias. Siguiendo los resultados de esta línea, en el Capítulo 7 nos propusimos analizar el efecto de la movilidad social ascendente y descendente sobre las actitudes hacia la redistribución (OE5). A través de tres estudios (uno transversal y dos experimentales) en diferentes países (Italia y España), encontramos que las creencias de movilidad social ascendente estaban negativamente relacionadas con las actitudes hacia la redistribución, mientras que las creencias de movilidad social descendente estaban positivamente relacionadas.

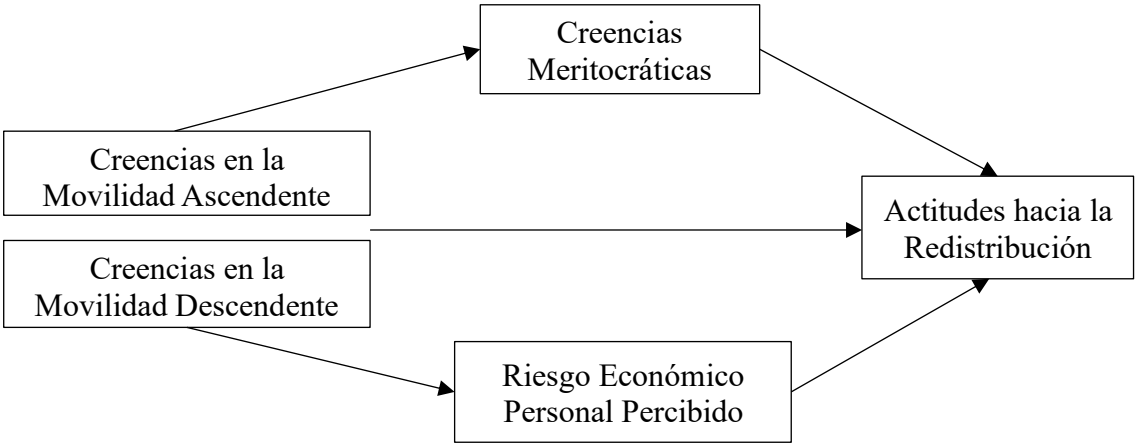
De manera consistente con estudios previos (e.g., ver García-Muniesa, 2019), demostramos que las creencias que tienen las personas sobre la movilidad social en su entorno son relevantes en la formación de las actitudes hacia las políticas redistributivas. Los distintos tipos de creencias sobre la movilidad societal (ascendente y descendente) tienen el potencial de desencadenar consecuencias diferentes en el apoyo de las personas a las políticas redistributivas (Durante et al., 2014).

¿Qué mecanismos pueden explicar el efecto de las creencias en la movilidad social ascendente y descendente sobre las actitudes hacia la redistribución? (P6)

Además, en Capítulo 6, estudiamos qué posibles mecanismos psicológicos podrían explicar los efectos de las creencias en la movilidad societal sobre las actitudes hacia la redistribución. Para ello, examinamos si las creencias meritocráticas median el efecto de las creencias en la movilidad social ascendente sobre las actitudes hacia la redistribución (OE 6.1); y, si el riesgo económico percibido media el efecto de las creencias en la movilidad social descendente sobre las actitudes hacia la redistribución (OE 6.2). A través de los 3 estudios (uno

transversal y dos experimentales) que conforman el Capítulo 6, encontramos que, aunque las creencias meritocráticas explicaban el efecto de las creencias de movilidad societal ascendente sobre las actitudes hacia la redistribución, los riesgos económicos personales percibidos explicaban el efecto de las creencias en la movilidad societal descendente (ver Figura 5).

Figura 5. Modelo Conceptual



8.4 Limitaciones

Aunque los estudios realizados en esta tesis representan una contribución a la psicología social, es importante tener en cuenta que no carecen de limitaciones. A continuación, procederemos a resumir algunas de ellas incluso si ya han sido mencionadas previamente en los diversos capítulos empíricos.

En el Capítulo 5, en el Estudio 1, nos esforzamos por simplificar la estimación de la movilidad. Sin embargo, somos conscientes que parte del sesgo perceptivo podría atribuirse a simples errores de estimación. En el Estudio 2, adoptamos enfoques utilizados en investigaciones anteriores (Bucca, 2016; Du et al., 2021; Gimpelson & Monusova, 2014; Mijs

et al., 2022) y controlamos algunas de las limitaciones del Estudio 1. Para ello, operacionalizamos las creencias de movilidad social mediante una resta, utilizando las puntuaciones de la Escala MacArthur de Estatus Social Subjetivo (Adler et al., 2000). Sin embargo, debemos reconocer que este enfoque también tiene algunas limitaciones. Un ejemplo de ello es que las personas tienden a ubicarse en posiciones intermedias al indicar su estatus socioeconómico subjetivo (Evans & Kelley, 2004), lo que podría generar errores de medición y afectar los resultados. Por lo tanto, futuros estudios deben replicar estos hallazgos utilizando diferentes medidas de creencias en la movilidad social.

Otra limitación podría estar relacionada con el orden en que presentamos las variables en el estudio. Primero se presentó la movilidad personal y luego la movilidad societal. Esto pudo haber causado que los participantes tuvieran un indicador de movilidad de referencia (es decir, un sesgo de anclaje) al estimar la movilidad social. Para abordar esta limitación, futuros estudios deberán contrabalancear la administración de las dos medidas de movilidad.

En relación con el Capítulo 6, creemos que esta investigación hace importantes aportaciones, aunque también tiene algunas limitaciones. Por ejemplo, la muestra utilizada en nuestros estudios no representa completamente la diversidad sociodemográfica de la sociedad española, en cuanto al estatus socioeconómico subjetivo, orientación política y nivel educativo de los participantes. Si bien consideramos que las diferencias entre las dos dimensiones de las creencias de movilidad social podrían replicarse en otras muestras y contextos, reconocemos la limitación de haber llevado a cabo nuestro estudio en un contexto específico. Por lo tanto, es esencial que futuros estudios investiguen si la escala de creencias de movilidad social mantiene sus propiedades psicométricas en diversas circunstancias y contextos culturales. Esta ampliación de la investigación permitiría obtener una comprensión más sólida y generalizable de las creencias de movilidad social y su relación con otras variables relevantes.

Aunque los resultados fueron consistentes en los tres estudios del Capítulo 7, somos conscientes de las posibles limitaciones en el diseño de nuestra investigación. Por ejemplo, el Estudio 1 tiene un diseño transversal, y en los Estudios 2 y 3 no manipulamos la variable mediadora. Por lo tanto, no podemos inferir una mediación causal directa a través de los mecanismos propuestos (e.g., ver Fiedler et al., 2011; Pirlott & MacKinnon, 2016; Rohrer et al., 2022). Para obtener una comprensión más completa, futuros estudios deberán replicar los distintos mecanismos propuestos y utilizar diseños experimentales de mediación.

También, es importante destacar que la redistribución puede referirse a diversos procesos asociados con la reducción de la brecha entre ricos y pobres. Algunas personas pueden no desear redistribuir en todos los ámbitos, sino promover la equidad invirtiendo en un área específica, como una mejor educación, por ejemplo. En nuestros estudios, utilizamos medidas de redistribución generales (e.g., "el Gobierno tiene la responsabilidad de reducir las diferencias de ingresos entre los/as que tienen más y los/as que tienen menos"). Sin embargo, algunos estudios encuentran discrepancias entre las opiniones sobre redistribución en general y medidas más específicas. Es decir, algunas personas podrían estar de acuerdo con ciertas medidas, pero no con otras (Alesina et al., 2018), o no estar de acuerdo con la redistribución cuando existen altos niveles de corrupción gubernamental (Sánchez & Goda, 2018). Para abordar esta cuestión, futuros estudios deberían explorar la relación entre las creencias de movilidad social (tanto ascendente y descendente) y las actitudes hacia la redistribución utilizando diferentes medidas y enfoques más específicos.

Además, una de las principales limitaciones de las muestras utilizadas es que están formadas por personas provenientes de sociedades WEIRD [acrónimo inglés de *white* (blanca), *educated* (educada), *industrialized* (industrializada), *rich* (rica), *democratic* (democrática)]. Será esencial replicar estos modelos en diversos contextos (e.g., sociedades no WEIRD) y analizar si los efectos encontrados se mantienen en el tiempo. Las investigaciones futuras

pueden ampliar los resultados actuales explorando variables moderadoras del efecto de la movilidad en la redistribución. De esta forma, podrían identificar posibles variables que atenúen el efecto de las creencias de movilidad ascendente en la oposición a las políticas redistributivas.

8.5 Implicaciones y futuras investigaciones

En este apartado se describen en primer lugar algunas implicaciones teóricas y prácticas derivadas de los resultados obtenidos en las investigaciones llevadas a cabo en la presente tesis doctoral. También, algunas propuestas de futuras investigaciones que podría arrojar luz a cómo las creencias en la movilidad social afectan a las personas.

Los resultados mostrados en el Capítulo 7 apoyan las investigaciones recientes que muestran que la movilidad ascendente y descendente pueden considerarse constructos independientes (Browman et al., 2021) con consecuencias diferentes (Davidai & Gilovich, 2015b; Melita, Gobel et al., 2023). También, presentamos un nuevo instrumento de medida para evaluar las creencias ascendente y descendente de la movilidad, que podrá ser útil en futuras investigaciones.

Además, los diferentes mecanismos estudiados podrían explicar diferentes fenómenos. Por un lado, por qué, en contextos de inestabilidad económica (por ejemplo, la crisis financiera de 2008, la crisis COVID-19), las personas son más propensas a apoyar medidas redistributivas (Margalit, 2013; Mijs et al., 2022; Oliveira, 2014). Por otro lado, por qué, en contextos meritocráticos (por ejemplo, cuando en EEUU se promueve el "*American Dream*"), las personas tienden más a oponerse a las políticas redistributivas (Corneo & Grüner, 2002).

Los resultados expuestos en el Capítulo 6 sobre la relación negativa entre la movilidad social ascendente y descendente podrían ser una contribución importante al estudio de las creencias en la movilidad social y sus posibles consecuencias. Teniendo en cuenta estos resultados, podría tratarse de dos efectos contrapuestos que podrían anularse mutuamente

(MacKinnon et al., 2000). Por lo tanto, la inclusión de ambos tipos de movilidad en el mismo modelo podría dar lugar a resultados no significativos, o a un efecto nulo. Esto podría arrojar una visión más precisa sobre las creencias en la movilidad social, ayudando a aclarar si los dos tipos de movilidad social pueden entenderse como mecanismos opuestos de movilidad.

Teniendo en cuenta los resultados de esta tesis, futuros estudios deberán estudiar en detalle cada tipo específico de creencia en la movilidad social (ver Davidai & Wienk, 2021; Day & Fiske, 2019), y cómo estas creencias pueden interactuar simultáneamente. Por ejemplo, en los Estudios 2 y 3 del Capítulo 7 manipulamos: 1) las creencias en la movilidad ascendente; 2) descendente; 3) inmovilidad. Futuras investigación deberían intentar diseñar escalas de medición, así como intentar manipular otros tipos de movilidad, por ejemplo: 1) Según el tipo de movilidad (absoluta y relativa); 2) según el target de comparación (personal y societal); 3) según el tiempo de la movilidad (intrageneracional e intergeneracional).

En el Estudio 1 del Capítulo 5 encontramos que las personas españolas subestiman la movilidad social económica real existen en España. La divergencia entre nuestros hallazgos y los resultados del estudio llevado a cabo por Jaime-Castillo y Marqués-Perales (2014) en contexto español podría estar señalando algunas de las cuestionas que ya han sido señaladas en los capítulos teóricos: la dificultad a la hora de operacionalizar el constructo debido a su multidimensionalidad. Asimismo, abre una ventana de posibles estudios donde se intenten replicar los resultados encontrados en el Estudio 1 del Capítulo 5, utilizando diferentes formas de operacionalizar las creencias en la movilidad social (e.g., clases según clases sociales, estatus socioeconómico subjetiva), y la movilidad objetiva (e.g., ingresos, ocupación, educación).

La incorporación de otras metodologías para operacionalizar las creencias en la movilidad social podría aportar nuevas perspectivas a los hallazgos presentados en esta tesis doctoral. Algunas investigaciones han señalado que los efectos de la movilidad social podrían estar relacionados más con la clase de origen o destino que con un efecto directo de la movilidad

social *per se* (Ciccolini & Härkönen, 2023; Van der Wal et al., 2017). La posición social de una persona en la escala social (por ejemplo, posición 3 de 10) y/o la posición de destino (por ejemplo, posición de destino 8 de 10) pueden confundirse con los efectos de la movilidad social propiamente dicha (es decir, el cambio de posición de 3 a 8 de 10). Para abordar esta cuestión, futuros estudios deben replicar los efectos de la presente investigación utilizando formulaciones que controlen los efectos de la posición de clase de destino (e.g., ver Luo, 2022, para el Modelo de Contraste de Movilidad; o Sobel, 1981, para el Modelo de Movilidad Diagonal).

En relación a las implicaciones prácticas, en los Estudios 1 y 2, que comprenden el Capítulo 5, descubrimos que las personas tienden a ser más optimistas sobre sus riesgos personales que sobre los riesgos colectivos. Este sesgo podría tener consecuencias importantes relacionadas con la aplicación de políticas redistributivas para reducir la desigualdad económica. Estudios recientes han demostrado que los individuos tienden a apoyar menos la redistribución cuando piensan de forma optimista sobre su futuro en relación con sus riesgos personales, en comparación con sus riesgos colectivos (Galdi et al., 2020). El presente estudio aporta evidencias de una percepción dual de la movilidad social. Estos resultados podrían ayudar a diseñar campañas en favor de las políticas redistributivas y como consecuencia a reducir los niveles existentes de desigualdad económica.

La literatura previa ha mostrado que cuando a las personas que han sobrestimado previamente su posición actual se le muestra su posición real tienden a apoyar en mayor medida las políticas redistributivas (e.g., Cruces et al., 2013). De este modo, las campañas podrían estar dirigidas a contrarrestar el sesgo optimista de las personas, por ejemplo, a través de campaña de concienciación sobre el nivel de movilidad social real. Por consiguiente, las personas podrían llegar a concienciarse de la dificultad real de llegar a lo más alto de la estructura social, pudiendo favorecer las actitudes positivas hacia las políticas redistributivas.

8.6 Conclusions (English)

In this doctoral thesis, we studied social mobility beliefs and their psychosocial consequences. In Chapter 5, we supported previous research showing that people find it difficult to accurately estimate actual economic social mobility and underestimate it in different European countries. Furthermore, this research shows that this cognitive bias might relate more to personal mobility than societal mobility. Our results indicate that people have a more substantial optimistic bias when estimating their mobility (i.e., personal mobility) than when estimating societal mobility (i.e., societal mobility). Moreover, these differences occur regardless of whether people estimate their mobility over their lifetime (i.e., intragenerational personal mobility) or between generations (i.e., intergenerational personal mobility).

In Chapter 6, we examined the bi-dimensionality of societal mobility beliefs: upward and downward. We showed that both types of mobility can be considered independent constructs. In addition, we developed the bidimensional social mobility belief scale, which we hope can be of help to future research interested in the effects of different types of social mobility beliefs.

In Chapter 7, we demonstrated that upward and downward societal mobility beliefs are important in shaping attitudes toward redistributive policies. In particular, on the one hand, our findings show that when people believe that it is easy to worsen their social position, they tend to perceive higher economic risks, and this leads to more positive attitudes toward redistribution. On the other hand, when people believe that it is easy to improve their social position, they tend to endorse meritocratic beliefs, and this fosters more negative attitudes toward redistribution.

Overall, the findings of this thesis support previous literature by suggesting that there are differences between objective social mobility and social mobility beliefs and that people are more optimistic about their mobility (i.e., personal mobility) than about the existing mobility in

the country in which they live (i.e., societal mobility). Also, the results of this dissertation support a recent framework of social mobility beliefs in Social Psychology, in which it is argued that different types of mobility may have different effects (e.g., Davidai & Wienk, 2021). Furthermore, we present a new measurement instrument that allows discriminating between upward and downward societal mobility beliefs. In this way, we contribute to future research investigating the various consequences of different types of mobility. In short, we showed that people may have a biased view of actual social mobility and that different types of mobility (e.g., upward and downward) may have different effects (e.g., in maintaining economic inequality). In particular, while upward mobility promotes the maintenance of economic inequality, downward mobility favors change toward more egalitarian societies. These results could help to design campaigns in favor of redistributive policies, thus promoting a reduction in inequality between people with more and less resources.

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MATERIAL SUPLEMENTARIO

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Material Suplementario

Supplementary Material

Supplementary Material

(Mis)perception in Social Mobility: Optimistic Bias for Personal (but not Societal) Mobility Beliefs

Table of contents:

S1

Table S1

Sociodemographic Characteristics

Variables	**Study 1** N = 480	**Study 2** N = 274
Age	24.62 (7.74)[1]	36.57 (14.63)[1]
Participant's Income	€1482.86 (€4980.43)	€2613.06 (€4934.16)
(Missing)	15	12
Gender		
Male	161 (33.54%)[2]	79 (28.83%)[2]
Female	312 (65.00%)	195 (71.17%)
Other	7 (1.46%)	0 (0 %)
Marital Status		
Single	301 (62.71%)	95 (34.67%)
With partner	151 (31.46%)	81 (29.56%)
Married	24 (5.00%)	84 (30.66%)
Divorced	4 (0.83%)	12 (4.38%)
Widowed	0 (0.00%)	2 (0.73%)
Educational Attainment		
No schooling	0 (0.00%)	0 (0.00%)
Primary education	3 (0.63%)	11 (4.03%)
Secondary education	140 (29.17%)	62 (22.71%)
University studies	198 (41.25%)	97 (35.53%)
Postgraduate	139 (28.96%)	103 (37.73%)
(Missing)	0 (0 %)	1
Occupation		
Unemployed	21 (4.38%)	19 (6.93%)
Student	304 (63.33%)	70 (25.55%)
Student and part-time worker	74 (15.42%)	28 (10.22%)
Part-time worker	7 (1.46%)	19 (6.93%)
Full-time worker	74 (15.42%)	128 (46.72%)
Retired	0 (0.00%)	10 (3.65%)
(Missing)	0 (0 %)	0 (0 %)
Subjective Socio-economic Status		
1	14 (2.92%)	5 (1.82%)
2	8 (1.67%)	3 (1.09%)
3	46 (9.58%)	16 (5.84%)
4	73 (15.21%)	30 (10.95%)
5	127 (26.46%)	56 (20.44%)
6	106 (22.08%)	58 (21.17%)
7	82 (17.08%)	82 (29.93%)
8	18 (3.75%)	20 (7.30%)
9	5 (1.04%)	3 (1.09%)
10	1 (0.21%)	1 (0.36%)
(Missing)	0 (0 %)	0 (0 %)
Political Orientation		
Far-left	55 (11.48%)	11 (4.12%)
Left	201 (41.96%)	109 (40.82%)
Center-left	92 (19.21%)	57 (21.35%)
Center	56 (11.69%)	39 (14.61%)
Center-right	53 (11.06%)	38 (14.23%)
Right	18 (3.76%)	10 (3.75%)
Far-right	4 (0.84%)	3 (1.12%)
(Missing)	0 (0 %)	7

Note: N, Total sample size; [1]Mean (SD); [2]Total number of participants (%)

S2

Table S2

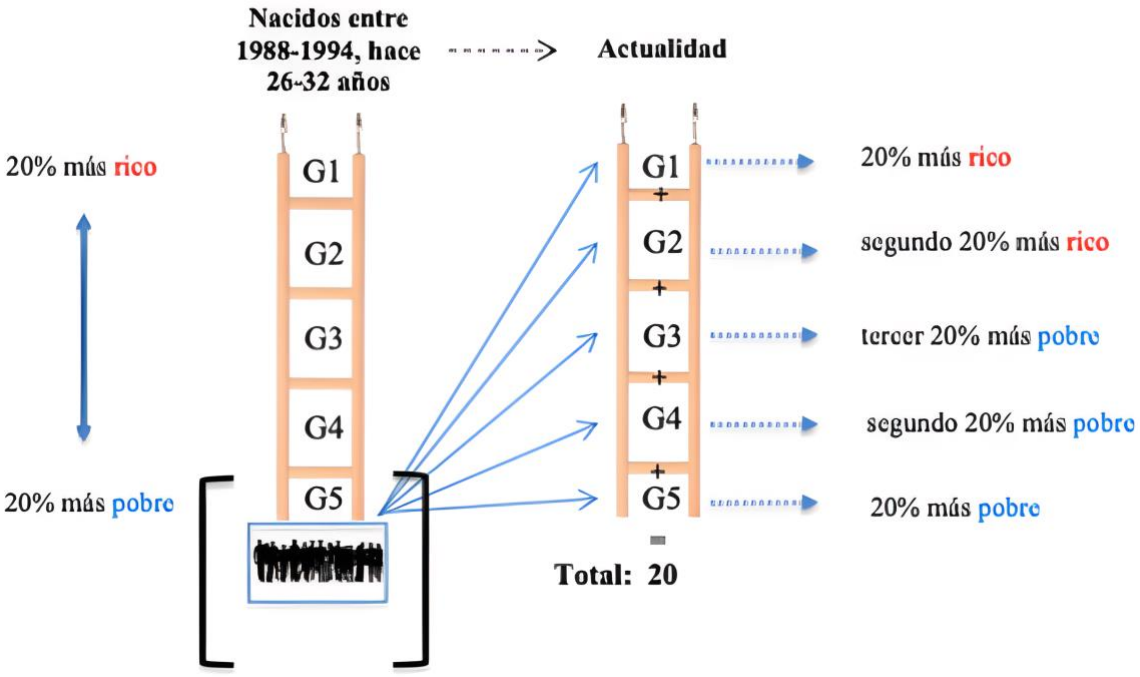
Descriptive and Association Between Variables in Study 1

Variable	*M*	*SD*	1	2	3	4	5	6	7	6
1. Intergenerational Societal Mobility Beliefs	53.57	27.59								
2. Age	24.62	7.74	-.13** [-.22, -.04]							
3. Gender	1.68	0.50	.11* [.02, .20]	-.12* [-.20, -.03]						
4. Marital Status	1.44	0.63	-.08 [-.17, .01]	.53** [.47, .60]	-.08 [-.17, .01]					
5. Education	3.99	0.78	-.11* [-.19, -.02]	.40** [.32, .47]	-.01 [-.10, .08]	.20** [.11, .28]				
6. Occupation	2.60	1.13	-.11* [-.20, -.02]	.66** [.61, .71]	-.14** [-.23, -.05]	.42** [.34, .49]	.42** [.34, .49]			
7. Participant' Income	1482.86	4980.43	-.07 [-.16, .03]	.27** [.18, .35]	-.09 [-.18, .00]	.13** [.04, .22]	.06 [-.03, .15]	.14** [.05, .22]		
8. SSS	5.22	1.60	.07 [-.02, .16]	.15** [.06, .24]	-.05 [-.14, .04]	.15** [.06, .23]	.13** [.05, .22]	.23** [.15, .32]	.13** [.04, .22]	
9. Political Orientation	2.84	1.37	.18** [.09, .27]	.04 [-.05, .13]	-.09* [-.18, -.00]	.04 [-.05, .12]	.03 [-.06, .12]	.05 [-.04, .14]	.01 [-.09, .10]	.26** [.17, .34]

Note. $N = 480$; SSS, Subjective Socioeconomic; Status *M* and *SD* are used to represent mean and standard deviation, respectively. Values in square brackets indicate the 95% confidence interval for each correlation. The confidence interval is a plausible range of population correlations that could have caused the sample correlation (Cumming, 2014). * indicates $p < .05$. ** indicates $p < .01$.

S3

¿Dónde estarán las **20 personas** nacidas en el **grupo 5** (el grupo más pobre) entre **1988-1994**, eso es, **hace entre 26-32 años,** en la **actualidad**?



S4

Graphic Notes Measure. It reflects the perception of the economic structure of a society taking into account income quintiles (Rodríguez-Bailón et al., 2017). It was measured by seven graphic figures which represented how resources are distributed among the different income quintiles. Answers were provided on a 7-point Likert scale, ranging from A (*society totally equality*) to G (*society totally inequality*). To be consistent with all items measuring perceived economic inequality, the current item was reversed.

Diagrammatic Measure. It assesses the perception of a society's economic distribution (ISPP, 2009). It was measure through of 5 different graphic figures which depicting different patterns of wealth distributions in Spain. Answers were provided on a 5-point Likert scale ranging from 1 (*society totally inequality*) to 5 (*society totally equality*). Participants chose one graphic figure that they believe most accurately represent Spanish society.

Open Question Format. Open Question Format measures the extent to which current income inequality is perceived. It was measured by an item: "to what extent do you think the distribution of income in Spain is very unequal (most Spaniards have very low incomes, however, there is a small group who have very high incomes) or equal (most Spaniards have a similar average monthly salary)". Answers were provided on a 7-point Likert scale, ranging from 1 (*totally unequal*) to 7 (*totally equal*).

Dispositional optimism. The scale (Spanish adaptation of Life Orientation Test-Revised by Otero-López et al., 1998; Scheier et al., 1994) is composed by 10 items. A total of 3 items assesses dispositional optimism (e.g., “I am always optimistic about the future”; “If something bad has to happen to me, I'm sure it will”), and 3 items assess dispositional pessimism (e.g., “I am always optimistic about the future”; “If something bad has to happen to me, I'm sure it will”), while the remaining 4 are “fillers”. Answers were provided on a 7-point

Likert scale ranging from 1 (*totally disagree*) to 7 (*totally agree*). We inverted the three items of dispositional pessimism; therefore, a high score means high dispositional optimism (α = .74).

Table S3

Descriptive and Association Between Variables in Study 2

Variable	*M*	*SD*	1	2	3	4
1. Intragenerational Personal Mobility Beliefs	0.68	1.59				
2. Intergenerational Personal Mobility Beliefs	0.61	2.01	.60** [.52, .67]			
3. Intragenerational Societal Mobility Beliefs	0.41	1.66	.68** [.61, .74]	.53** [.44, .61]		
4. Intergenerational Societal Mobility Beliefs	0.47	1.97	.55** [.46, .63]	.83** [.80, .87]	.68** [.61, .74]	
5. Meritocratic Beliefs	3.14	1.32	-.07 [-.18, .05]	-.01 [-.13, .11]	-.10 [-.22, .02]	-.03 [-.15, .09]
6. Optimism	4.41	1.32	.06 [-.06, .18]	.00 [-.12, .12]	-.05 [-.17, .07]	-.01 [-.12, .11]
7. Age	36.57	14.63	-.44** [-.53, -.34]	-.22** [-.33, -.10]	-.41** [-.50, -.30]	-.26** [-.37, -.15]
8. Gender	1.71	0.45	.08 [-.04, .20]	.02 [-.10, .14]	.11 [-.01, .22]	.08 [-.03, .20]
9. Marital Status	2.07	0.94	-.28** [-.39, -.17]	-.11 [-.23, .01]	-.27** [-.38, -.16]	-.15* [-.26, -.03]
10. Education	4.07	0.87	.06 [-.06, .17]	-.09 [-.21, .03]	.12 [-.00, .23]	-.05 [-.17, .07]
11. Occupation	3.72	1.51	-.27** [-.38, -.16]	-.32** [-.43, -.21]	-.20** [-.31, -.09]	-.26** [-.37, -.14]
12. Participant' Income	2613.06	4934.16	.01 [-.11, .13]	-.06 [-.18, .06]	-.05 [-.17, .07]	-.05 [-.17, .07]
13. SSS	5.76	1.58	-.43** [-.52, -.33]	-.55** [-.63, -.46]	-.39** [-.48, -.28]	-.53** [-.61, -.44]
14. Political Orientation	3.10	1.34	-.11 [-.22, .01]	-.10 [-.22, .02]	-.09 [-.21, .03]	-.05 [-.17, .07]
15. Inequality GNM	5.70	1.27	-.05 [-.17, .07]	-.06 [-.18, .06]	-.06 [-.17, .06]	-.06 [-.17, .06]
16. Inequality DM	2.74	0.99	-.13* [-.25, -.01]	-.01 [-.13, .11]	-.09 [-.21, .02]	-.05 [-.16, .07]
17. Inequality OQF	2.16	1.07	.03 [-.09, .15]	-.03 [-.15, .09]	.03 [-.09, .15]	-.02 [-.14, .10]

Note. Note. N = 480; SSS, Subjective Socioeconomic; GNM, Graphic Notes Measure; DM, Diagrammatic Measure; OQF, Open Question Format*; M* and *SD* are used to represent mean and standard deviation, respectively. Values in square brackets indicate the 95% confidence interval for each correlation. The confidence interval is a plausible range of population correlations that could have caused the sample correlation (Cumming, 2014). * indicates $p < .05$. ** indicates $p < .01$.

S5

Table S4

Regression Coefficients of Meritocratic Beliefs (along with covariates) on Intra/intergenerational Personal and Societal Mobility Beliefs in Study 2

	Intragenerational personal mobility beliefs				**Intergenerational personal mobility beliefs**				**Intragenerational societal mobility beliefs**				**Intergenerational societal mobility beliefs**			
Predictors	*Estimates*	*std. Error*	*CI*	*p*	*Estimates*	*std. Error*	*CI*	*p*	*Estimates*	*std. Error*	*CI*	*p*	*Estimates*	*std. Error*	*CI*	*p*
(Intercept)	2.895	0.689	1.539 – 4.252	**<0.001**	4.187	0.914	2.386 – 5.987	**<0.001**	1.880	0.759	0.384 – 3.376	**0.014**	3.154	0.891	1.398 – 4.910	**<0.001**
Meritocratic Beliefs	0.174	0.073	0.030 – 0.317	**0.018**	0.183	0.097	-0.007 – 0.374	0.059	0.047	0.080	-0.111 – 0.206	0.555	0.125	0.094	-0.061 – 0.311	0.187
Optimism	0.188	0.073	0.044 – 0.331	**0.010**	0.148	0.097	-0.042 – 0.338	0.127	0.101	0.080	-0.057 – 0.259	0.210	0.182	0.094	-0.003 – 0.368	0.054
Age	-0.053	0.009	-0.070 – -0.036	**<0.001**	-0.027	0.011	-0.050 – -0.005	**0.019**	-0.044	0.009	-0.063 – -0.025	**<0.001**	-0.038	0.011	-0.060 – -0.016	**0.001**
Gender	0.150	0.176	-0.197 – 0.496	0.396	-0.121	0.234	-0.582 – 0.339	0.605	0.322	0.194	-0.061 – 0.704	0.099	0.217	0.228	-0.232 – 0.666	0.341
Marital Status	0.129	0.123	-0.113 – 0.370	0.296	0.181	0.163	-0.139 – 0.502	0.266	0.047	0.135	-0.219 – 0.314	0.727	0.111	0.159	-0.202 – 0.424	0.485
Education	0.245	0.101	0.046 – 0.444	**0.016**	0.172	0.134	-0.092 – 0.436	0.200	0.327	0.111	0.108 – 0.547	**0.004**	0.164	0.131	-0.094 – 0.422	0.211
Occupation	-0.024	0.067	-0.157 – 0.109	0.727	-0.202	0.090	-0.378 – -0.025	**0.025**	0.044	0.074	-0.103 – 0.190	0.556	-0.030	0.087	-0.202 – 0.142	0.731
Participant' Income	0.000	0.000	-0.000 – 0.000	0.055	0.000	0.000	-0.000 – 0.000	0.514	0.000	0.000	-0.000 – 0.000	0.879	0.000	0.000	-0.000 – 0.000	0.543
SSS	-0.480	0.053	-0.585 – -0.374	**<0.001**	-0.708	0.071	-0.848 – -0.568	**<0.001**	-0.436	0.059	-0.552 – -0.320	**<0.001**	-0.667	0.069	-0.803 – -0.531	**<0.001**
Political Orientation	-0.033	0.063	-0.156 – 0.090	0.599	-0.104	0.083	-0.268 – 0.059	0.210	-0.002	0.069	-0.138 – 0.134	0.976	0.012	0.081	-0.148 – 0.172	0.883
Inequality GNM	0.088	0.068	-0.046 – 0.221	0.196	0.148	0.090	-0.029 – 0.326	0.100	0.102	0.075	-0.046 – 0.249	0.175	0.091	0.088	-0.082 – 0.264	0.301
Inequality DM	-0.249	0.087	-0.421 – -0.077	**0.005**	0.047	0.116	-0.181 – 0.275	0.685	-0.169	0.096	-0.358 – 0.021	0.081	-0.058	0.113	-0.280 – 0.165	0.609
Inequality OQF	0.087	0.087	-0.085 – 0.259	0.319	-0.021	0.116	-0.249 – 0.207	0.857	0.066	0.096	-0.124 – 0.255	0.495	0.025	0.113	-0.198 – 0.247	0.828
Observations				253				253				253				253
R^2 / R^2 adjusted				0.440 / 0.410				0.384 / 0.351				0.345 / 0.309				0.359 / 0.325
Deviance				359.062				632.459				436.657				601.587
AIC				836.560				979.788				886.060				967.127

Note: SSS, Subjective Socioeconomic Status; GNM, Graphic Notes Measure; DM, Diagrammatic Measure; OQF, Open Question Format; All VIFs ≤ 1.96.

Supplementary Material

Rising and Falling on the Social Ladder: The Bidimensional Social Mobility Beliefs Scale

Table of contents:

S1

Panel of expert's procedure

Following DeVellis (2017), we created an item pool at least three times as large as the final scale. Then, a panel of experts was selected to evaluate different dimensions of the items: ambiguity, representativeness, intelligibility, and relevance (Carretero-Dios & Pérez, 2005). The panel of experts comprised five experienced researchers in social psychology and behavioral science methodology (Lynn, 1986). A self-administered online questionnaire invited a panel of experts to evaluate the dimensions of the 26 items that made up the battery of items on social mobility beliefs. The questionnaire included, in the following order: task instructions, conceptual delimitation of the construct (social mobility) and the subdimensions (upward and downward social), the items, and different questions about the assessment of the items. The judges should indicate the *ambiguity* of the item (i.e., the category to which the item corresponded: upward or downward mobility) and evaluate it on a 5-point Likert scale (Haynes et al., 1995). Also, the *representativeness* (1 = "Not at all"; 5 = "Completely"), *intelligibility* (1 = "Not at all understandable"; 5 = "Very understandable"), and *relevance* (1 = "Unimportant"; 5 = "Very important"). Finally, some considerations and comments for improvement were collected. A content validity index (CVI) ≥ 80% was established (Hyrkäs et al., 2003). Considering the above criteria, six items were eliminated as they had insufficient content validity, that is, below the default value (CVI ≤ 80%). The resulting scale was composed of 20 items on social mobility beliefs. The items represent beliefs in upward (10 items) and downward (10 items) social mobility

S2

Bidimensional Social Mobility Beliefs Scale (20 items)

Upward social mobility dimension:

- BSMBS_1u: En la sociedad española, la mayoría de las personas tienen ingresos más altos de una generación a otra (In Spanish society, most people have higher incomes from one generation to the next).
- BSMBS_2u: Gran parte de la población española mejora su salario a lo largo de su vida (The majority of the Spanish population improves their salaries during their lifetime).
- BSMBS_3u: La mayoría de las familias españolas ocupan posiciones sociales superiores a las de la generación anterior (Most Spanish families occupy higher social positions than those of the previous generation).
- BSMBS_4u: En España, es frecuente que los(as) hijos(as) consigan un estatus socioeconómico superior al del hogar en el que crecieron (In Spain, children often achieve a higher socio-economic status than the household in which they grew up.).
- BSMBS_5u: En la sociedad española es frecuente que, a lo largo de su vida, una persona acabe trabajando en ocupaciones de mayor prestigio (In Spanish society it is often that, over the course of a person's life, a person ends up working in occupations of higher prestige).
- BSMBS_6u: Es bastante común en la sociedad española que las personas, a lo largo de su vida, asciendan a posiciones sociales más altas (It is quite common in Spanish society for people, over the course of their lifetime, to rise to higher social positions).

- BSMBS_7u: En España, las posibilidades de que los(as) hijos(as) consigan un nivel educativo mayor al de sus padres y madres son altas (In Spain, the chances of children achieving a higher level of education than their parents are high).
- BSMBS_8u: Los/as hijos/as de las personas españolas llegan a pertenecer a una clase social más alta en comparación con la clase de la que provienen (The children of Spanish people come to belong to a higher social class compared to the class they come from).
- BSMBS_9u: La mayoría de la población española mejora su estatus socioeconómico a lo largo de su vida (The majority of the Spanish population improves their socio-economic status throughout their lifetime).
- BSMBS_10u: Generalmente, en España, los(as) hijos(as) tienen mejores puestos de trabajo de una generación a otra (In Spain, children in general have better jobs from one generation to the next).

Downward social mobility dimension:

- BSMBS_11d: En la sociedad española, la mayoría de las personas tienen ingresos más bajos de una generación a otra (In Spanish society, most people have lower incomes from one generation to the next.).
- BSMBS_12d: Gran parte de la población española empeora su salario a lo largo de su vida (The majority of the Spanish population worsens their salaries during their lifetime).
- BSMBS_13d: La mayoría de las familias españolas ocupan posiciones sociales inferiores a las de la generación anterior (The majority of Spanish families have lower social positions than the previous generation).

- BSMBS_14d: En España, es frecuente que los(as) hijos(as) consigan un estatus socioeconómico inferior al del hogar en el que crecieron (In Spain, children often achieve a lower socio-economic status than the household in which they grew up).
- BSMBS_15d: En la sociedad española es frecuente que, a lo largo de su vida, una persona acabe trabajando en ocupaciones de menor prestigio (In Spanish society it is often that, over the course of a person's life, a person ends up working in occupations of lower prestige).
- BSMBS_16d: Es bastante común en la sociedad española que las personas, a lo largo de su vida, desciendan a posiciones sociales más bajas (It is quite common in Spanish society for people, over the course of their lifetime, to descend to lower social positions).
- BSMBS_17d: En España, las posibilidades de que los(as) hijos(as) consigan un nivel educativo mayor al de sus padres y madres son bajas (In Spain, the chances of children achieving a higher level of education than their parents are low).
- BSMBS_18d: Los/as hijos/as de las personas españolas llegan a pertenecer a una clase social más baja en comparación con la clase de la que provienen (The children of Spanish people come to belong to a lower social class compared to the class they come from).
- BSMBS_19d: La mayoría de la población española empeora su estatus socioeconómico a lo largo de su vida (The majority of the Spanish population worsen their socio-economic status throughout their lifetime).
- BSMBS_20d: Generalmente, en España, los(as) hijos(as) tienen peores puestos de trabajo de una generación a otra (In Spain, children in general have worsen jobs from one generation to the next).

S3
S1 Table

Sociodemographic Characteristics (Studies 1-2)

Variables	**Study 1** N = 164	**Study 2** N = 400
Age	43.41 (12.34)[1]	32.50 (14.05)[1]
Participant' Income	€5064.32 (12172.53)	€2863.01 (5879.58)
Gender		
Male	84 (51.22%)[2]	153 (38.25%)[2]
Female	78 (47.56%)	243 (60.75%)
Other	2 (1.22%)	4 (1.00%)
Marital Status		
Single	35 (21.34%)	170 (42.50%)
With partner	51 (31.10%)	130 (32.50%)
Married	74 (45.12%)	86 (21.50%)
Divorced	3 (1.83%)	14 (3.50%)
Widowed	1 (0.61%)	0 (0.00%)
Educational Attainment		
No schooling	0 (0.00%)	0 (0.00%)
Primary education	3 (1.83%)	3 (0.75%)
Secondary education obligatory	2 (1.22%)	4 (1.00%)
Secondary education no obligatory	11 (6.71%)	128 (32.00%)
Professional training	16 (9.76%)	31 (7.75%)
University studies	64 (39.02%)	123 (30.75%)
Postgraduate	68 (41.46%)	111 (27.75%)
Occupation		
Unemployed	15 (9.20%)	12 (3.00%)
Student	7 (4.29%)	163 (40.75%)
Student and part-time worker	6 (3.68%)	35 (8.75%)
Part-time worker	3 (1.84%)	6 (1.50%)
Full-time worker	123 (75.46%)	176 (44.00%)
Retired	9 (5.52%)	8 (2.00%)
(Missing)	1	2 (0.50%)
Subjective Socio-economic Status		
1	1 (0.61%)	7 (1.75%)
3	8 (4.88%)	14 (3.50%)
4	22 (13.41%)	45 (11.25%)
5	24 (14.63%)	88 (22.00%)
6	45 (27.44%)	120 (30.00%)
7	46 (28.05%)	94 (23.50%)
8	15 (9.15%)	28 (7.00%)
9	3 (1.83%)	2 (0.50%)
10	0 (0.00%)	0 (0.00%)
Political Orientation		
Far-left	16 (9.94%)	35 (8.79%)
Left	74 (45.96%)	191 (47.99%)
Center-left	29 (18.01%)	85 (21.36%)
Center	26 (16.15%)	44 (11.06%)

Center-right	10 (6.21%)	29 (7.29%)
Right	6 (3.73%)	13 (3.27%)
Far-right	0 (0.00%)	1 (0.3%)
(Missing)	3	2

Note: N, Total sample size; [1]Mean (SD); [2]Total number of participants (%)

S4

S2 Table

Loadings of Bidimensional Social Mobility Beliefs Scale and Social Mobility Beliefs Scale (Study 1)

Items	F1	F2	F3	h^2
SMBS_7	-0.82			0.62
SMBS_5	0.75			0.61
SMBS_8	-0.74			0.64
SMBS_2	0.73			0.64
SMBS_1	-0.70			0.58
SMBS_6	0.62			0.40
SMBS_4	0.62			0.57
SMBS_3	-0.50			0.29
BSMBS_8u		0.74		0.63
BSMBS_9u		0.70		0.65
BSMBS_4u		0.65		0.53
BSMBS_10u		0.58	-0.30	0.60
BSMBS_18d			0.72	0.59
BSMBS_13d			0.67	0.50
BSMBS_14d			0.65	0.52
BSMBS_11d			0.61	0.47

Note: N = 164; BSMBS, Bidimensional Social Mobility Beliefs Scale; SMBS, Social Mobility Beliefs Scale; F, factor; h^2, communality; Standardized loadings > .30 are reported

S5

S3 Table

Standardized loadings (pattern matrix) based upon Polychoric correlation matrix

	F1	F2	h2
BSMBS_8u	0.86		0.65
BSMBS_4u	0.78		0.60
BSMBS_9u	0.72		0.63
BSMBS_10u	0.71		0.66
BSMBS_13d		0.84	0.62
BSMBS_11d		0.70	0.52
BSMBS_14d		0.69	0.55
BSMBS_18d		0.67	0.58

Note: F, factor; h2, communality; Standardized loadings > .30 are reported

S6

S4 Table

Coefficients and bootstrapped confidence intervals based upon Pearson correlation matrix

	low	F1	upper	low	F2	upper
BSMBS_4u	0.55	0.74	0.92	-0.19	-0.01	0.11
BSMBS_8u	0.74	0.85	0.93	-0.04	0.12	0.23
BSMBS_9u	0.56	0.71	0.86	-0.26	-0.11	0.02
BSMBS_10u	0.49	0.67	0.86	-0.36	-0.17	-0.01
BSMBS_11d	-0.30	-0.02	0.21	0.44	0.69	0.90
BSMBS_13d	-0.16	0.08	0.25	0.58	0.79	0.94
BSMBS_14d	-0.27	-0.06	0.13	0.46	0.69	0.90
BSMBS_18d	-0.36	-0.13	0.08	0.41	0.65	0.88

Note: Standardized loadings; Bootstrap = 5000; F, factor.

S5 Table

Interfactor correlations and bootstrapped confidence intervals

	lower	estimate	upper
F1-F2	-0.69	-0.58	-0.38

Note: F, factor.

S7

S6 Table

Fit Indices for Measurement Invariance Across Gender

Invariance	Chisq	df	pvalue	CFI	TLI	SRMR	RMSEA [90% CI]
Configural	64.633	38	0.004	0.98	0.98	0.04	.04 (.03, .08)
Metric	70.31	44	0.007	0.99	0.98	0.04	.03 (.02, .07)
Scalar	76.837	50	0.009	0.99	0.98	0.04	.03 (.02, .07)
Residual	89.397	58	0.005	0.99	0.99	0.05	.03 (.02, .07)

Note: N=400; Gender: "1" = Male; "2" = Female; CFI = Comparative fit index; TLI = Tucker-Lewis index; SRMR = Standardized Root Mean Square Residual; RMSEA = root-mean-square error of approximation; CI = confidence interval.

S7 Table

Fit Indices for Measurement Invariance Across Subjective Socioeconomic Status (SSS)

Invariance	Chisq	df	pvalue	CFI	TLI	SRMR	RMSEA [90% CI]
Configural	57.672	38	0.021	0.99	0.99	0.03	0.03 (.02, .07)
Metric	61.751	44	0.04	0.99	0.99	0.04	0.02 (.01, .07)
Scalar	75.623	50	0.011	0.98	0.98	0.04	0.03 (.02, .07)
Residual	97.026	58	0.001	0.98	0.98	0.05	0.04 (.03, .07)

Note: N=400; SSS: "≤ 5" = Low SSS; "≥ 6" = High SSS; CFI = Comparative fit index; TLI = Tucker-Lewis index; SRMR = Standardized Root Mean Square Residual; RMSEA = root-mean-square error of approximation; CI = confidence interval.

S8

S8 Table

Anderson-Darling's Univariate Normality Test (Study 2)

Variable	Statistic	p value	Normality
BSMBS_4u_I1	108.015	<0.001	NO
BSMBS_8u_I2	106.213	<0.001	NO
BSMBS_9u_I3	114.071	<0.001	NO
BSMBS_10u_I4	108.954	<0.001	NO
BSMBS_11d_I5	96.250	<0.001	NO
BSMBS_13d_I6	102.278	<0.001	NO
BSMBS_14d_I7	100.492	<0.001	NO
BSMBS_18d_I8	112.657	<0.001	NO

Note: N = 400

S9 Table

Henze-Zirkler's Multivariate Normality Test (Study 2)

Statistic	p value	Normality
2.81	0	NO

Note: N = 400

S10 Table

Descriptive Statistics of Items (Study 2)

Item label	M	SD	Skewness	Kurtosis	Citc
Upward social mobility					
BSMBS_4u (I1)	3.83	1.37	-0.156	-0.754	0.81
BSMBS_8u (I2)	3.56	1.36	-0.121	-0.754	0.75
BSMBS_9u (I3)	4.06	1.34	-0.357	-0.362	0.58
BSMBS_10u (I4)	3.96	1.40	-0.180	-0.635	0.67
Downward social mobility					
BSMBS_11d (I5)	3.81	1.51	0.242	-0.775	0.64
BSMBS_13d (I6)	3.25	1.36	0.429	-0.167	0.66
BSMBS_14d (I7)	3.46	1.36	0.328	-0.383	0.70
BSMBS_18d (I8)	3.20	1.29	0.430	-0.130	0.65

Note: N = 400; M, mean; SD, standard deviation; Citc, corrected item-total correlation

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S10

Analyses pre-registered hypotheses (Study 2)

To test the original pre-registered hypotheses, we conducted a significance test for the comparison of correlations. The results showed significant differences between the correlations of the types of social mobility (upward and downward) and meritocratic beliefs (Z-score = 11.92; $p \leq .001$), confirming H1, economic system justification (Z-score = 9.18; $p \leq .001$), confirming H2, and status anxiety (Z-score = 6.23; $p \leq .001$), confirming H3.

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S11 Table
Societal Objective Indicators

	GINI (2020)	P50P10 (2019)	P90P10 (2019)	P90P50 (2019)	S80S20 (2019)	PALMA (2019)	HDI (2021)	IGM (2021)
Spain	34.9	2.4	4.8	2	5.7	1.19	0.91	0.78

Note: GINI, objective inequality index (from The World Bank, 2022); P50P10; interdecil P50/P10 (from OECD data, 2019); P90/P10, interdecil P90/P10 (from OECD data, 2019); P90/P50, interdecil P90/P50 (from OECD data, 2019); S80/S20, quintile share S80/S20 (from OECD data, 2019); PALMA, objective inequality index (from OECD data, 2019); HDI, Human Development Index (from Our World in Data, 2022); IGM, Intergenerational Mobility Index (from Our World in Data, 2021)

S12

S1 Appendix. **Bidimensional Social Mobility Beliefs Scale (BSMBS)**

Upward social mobility dimension:

- Item 1 (BSMBS_4u): En España, es frecuente que los(as) hijos(as) consigan un estatus socioeconómico superior al del hogar en el que crecieron (In Spain, children often achieve a higher socioeconomic status than the household in which they grew up).
- Item 2 (BSMBS_8u): Los/as hijos/as de las personas españolas llegan a pertenecer a una clase social más alta en comparación con la clase de la que provienen (The children of Spanish people come to belong to a higher social class compared to the class they come from).
- Item 3 (BSMBS_9u): La mayoría de la población española mejora su estatus socioeconómico a lo largo de su vida (The majority of the Spanish population improves their socioeconomic status throughout their lives).
- Item 4 (BSMBS_10u): Generalmente, en España, los(as) hijos(as) tienen mejores puestos de trabajo de una generación a otra (In Spain, children in general have better jobs from one generation to the next).

Downward social mobility dimension:

- Item 5 (BSMBS_11d): En la sociedad española, la mayoría de las personas tienen ingresos más bajos de una generación a otra (In Spanish society, most people have lower incomes from one generation to the next).
- Item 6 (BSMBS_13d): La mayoría de las familias españolas ocupan posiciones sociales inferiores a las de la generación anterior (The majority of Spanish families have lower social positions than the previous generation).

- Item 7 (BSMBS_14d): En España, es frecuente que los(as) hijos(as) consigan un estatus socioeconómico inferior al del hogar en el que crecieron (In Spain, children often achieve a lower socioeconomic status than the household in which they grew up).
- Item 8 (BSMBS_18d): Los/as hijos/as de las personas españolas llegan a pertenecer a una clase social más baja en comparación con la clase de la que provienen (The children of Spanish people come to belong to a lower social class compared to the class they come from).

Supplementary Material

Social Mobility Beliefs and Attitudes toward Redistribution: Potential Explanatory Mechanisms

Table of contents:

S1

Table S1

Sociodemographic Characteristics (Study 1)

Variables	N = 1536
Age	48.41 (17.21)[1]
Gender	
Male	746 (48.57%)[2]
Female	790 (51.43%)
Participant' Income	
Less than 600 €	107 (6.97%)
601 - 1000 €	154 (10.03%)
1001 - 1500 €	247 (16.08%)
1501 - 2000 €	256 (16.67%)
2001 - 2500 €	193 (12.57%)
2501 - 3000 €	186 (12.11%)
3001 - 3500 €	125 (8.14%)
3501 - 4000 €	102 (6.64%)
4001 - 5000 €	92 (5.99%)
5001 - 8000 €	52 (3.39%)
More than 8000 €	22 (1.43%)
Occupation	
Unemployed	188 (12.56%)
Student (solely dedicated to studying)	84 (5.61%)
Employed	757 (50.57%)
Self-employed	78 (5.21%)
Household work	51 (3.41%)
Other	11 (0.73%)
Retired	328 (21.91%)
(Missing)	39
Educational Attainment	
Sin estudios (Estudios primarios sin terminar)	21 (1.37%)
Primer Grado (Certificado escolar, EGB 1ª etapa, más o menos 10 años)	30 (1.95%)
Segundo Grado. 1er Ciclo (Graduado escolar, o EGB 2ª etapa, 1º y 2º ESO-1er ciclo- hasta 14 años)	154 (10.03%)
Segundo Grado. 2º Ciclo (FP Iº y IIº, Bachiller superior, BUP, 3º y 4º de ESO (2º ciclo) COU, PREU, 1º y 2º Bachillerato, hasta 18 años)	615 (40.04%)
Licenciatura, Grado. 2º Ciclo (Universitarios, Licenciados superior, Facultades, Escuelas técnicas superiores, etc	256 (16.67%)
Tercer Grado. 1er Ciclo (Equivalente a Ingeniero técnico, 3 años, Escuelas universitarias, Ingenieros técnicos, Arquitectos técnicos, Peritos, Magisterio, ATS, Diplomados universitarios, 3 años de carrera, Graduados sociales, Asistentes sociales, etc)	257 (16.73%)
Tercer Grado (Máster)	173 (11.26%)
Tercer Grado (Doctorado)	30 (1.95%)
Subjective Socio-economic Status	
1	28 (1.82%)
2	54 (3.52%)
3	143 (9.32%)
4	245 (15.96%)
5	409 (26.64%)
6	351 (22.87%)
7	231 (15.05%)
8	67 (4.36%)
9	3 (0.20%)
10	4 (0.26%)
(Missing)	1

Political Orientation	
0	185 (12.04%)
1	78 (5.08%)
2	192 (12.50%)
3	183 (11.91%)
4	131 (8.53%)
5	380 (24.74%)
6	103 (6.71%)
7	95 (6.18%)
8	87 (5.66%)
9	27 (1.76%)
10	75 (4.88%)

Note: N, Total sample size; [1]Mean (SD); [2]Total number of participants (%)

S2

Table S2

Confirmatory Factor Analysis of the Bidimensional Social Mobility Beliefs Scale (Study 1)

Models	Chisq	Df	p-value	CFI	TLI	SRMR	RMSEA [90% CI]
Model 1	1507.174	9	0	0.66	0.43	0.17	0.32 (.31, .34)
Model 2	67.449	8	0	0.98	0.97	0.03	0.07 (.05, .08)

Note: N=1536; CFI = Comparative Fit Index; TLI = Tucker-Lewis Index; SRMR = Standardized Root Mean Square Residual; RMSEA = Root-Mean-Square Error of Approximation; CI = Confidence Interval; Model 1 = one factor of social mobility. Model 2 = two-factors, composed by upward and downward social mobility.

S3

Table S3

Correlations Coefficients between Upward and Downward Social Mobility Beliefs and Other Constructs (Study 1)

	USMB	DSMB	AR	MB	PPER	SSS	PO
USMB		-0.390***	-0.123***	0.257***	-0.089***	0.234***	0.093***
DSMB			0.158***	-0.106***	0.206***	-0.175***	-0.013
AR				-0.238***	0.137***	-0.176***	-0.477***
MB					-0.179***	0.276***	0.189***
PPER						-0.439***	0.004
SSS							0.091***
M	4.07	3.79	5.20	2.98	4.21	5.16	4.17
SD	1.33	1.27	1.39	1.34	1.55	1.56	2.67

Note: Study 1 (Spain): N = 1536; Upward Social Mobility Beliefs; DSMB, Downward Social Mobility Beliefs; USMB; AR, Attitudes toward Redistribution; MB, Meritocratic Beliefs; PPER, Perceived Personal Economic Risk; SSS, Subjective Socioeconomic Status; PO, Political Orientation; M, mean; SD, standard deviation; *p < 0.05, **p < 0.01, ***p < 0.001

S4

Table S4

Sociodemographic Characteristics

Variables	**Study 2** N = 301	**Study 3** N = 638
Age	32.24 (9.97)[1]	24.06 (8.27)[1]
Participant' Income	€2654.83 (5128.07)	€1600.55 (3129.16)
(Missing)	13	27
Gender		
Male	135 (44.85%)[2]	176 (27.59%)[2]
Female	163 (54.15%)	455 (71.32%)
Other	3 (1.00%)	7 (1.10%)
Marital Status		
Single	123 (40.86%)	353 (55.33%)
With partner	120 (39.87%)	248 (38.87%)
Married	56 (18.60%)	31 (4.86%)
Divorced	2 (0.66%)	6 (0.94%)
Widowed	0 (0.00%)	0 (0.00%)
Occupation		
No schooling	0 (0.00%)	0 (0.00%)
Primary education	5 (1.66%)	1 (0.16%)
Secondary education	132 (43.85%)	274 (43.01%)
University studies	126 (41.86%)	261 (40.97%)
Postgraduate	38 (12.62%)	101 (15.86%)
(Missing)	-	1
Educational Attainment		
Unemployed	43 (14.29%)	15 (2.35%)
Student	71 (23.59%)	457 (71.63%)
Student and part-time worker	37 (12.29%)	76 (11.91%)
Part-time worker	35 (11.63%)	4 (0.63%)
Full-time worker	114 (37.87%)	82 (12.85%)
Retired	1 (0.33%)	4 (0.63%)
(Missing)	-	-
Subjective Socio-economic Status		
1	3 (1.00%)	3 (0.47%)
2	4 (1.33%)	4 (0.63%)
3	23 (7.64%)	33 (5.18%)
4	38 (12.62%)	102 (16.01%)
5	48 (15.95%)	139 (21.82%)
6	107 (35.55%)	194 (30.46%)
7	64 (21.26%)	140 (21.98%)
8	14 (4.65%)	22 (3.45%)

9	0 (0%)	0 (0%)
10	0 (0%)	0 (0%)
(Missing)	-	1
Political Orientation		
Far-left	15 (4.98%)	39 (6.17%)
Left	91 (30.23%)	252 (39.87%)
Center-left	94 (31.23%)	137 (21.68%)
Center	58 (19.27%)	104 (16.46%)
Center-right	31 (10.30%)	63 (9.97%)
Right	10 (3.32%)	34 (5.38%)
Far-right	2 (0.66%)	3 (0.47%)
(Missing)	-	6

Note: N, Total sample size; [1]Mean (SD); [2]Total number of participants (%)

S5

Table S5

Correlations Coefficients between Upward and Downward Social Mobility Beliefs and Other Constructs (Study 2)

	SMC	AR	MB	PPER	SSS
SMC					
AR	-0.207***				
MB	0.672***	-0.351***			
PPER	-0.726***	0.263***	-0.673***		
SSS	0.016	-0.101	0.031	0.095	
PO	-0.078	-0.305***	0.092	0.025	0.081

Note: N = 301; SMC, Social Mobility Conditions ("0", Downward; "1", Upward); AR, Attitudes toward Redistribution; MB, Meritocratic Beliefs; PPER, Perceived Personal Economic Risk; SSS, Subjective Socioeconomic Status; PO, Political Orientation; M, mean; SD, standard deviation; *p < 0.05, **p < 0.01, ***p < 0.001

S6

Table S6

Correlations Coefficients between Mobility Conditions and Other Constructs (Study 3)

	DD	UD	AR	MB	PPER	SSS
DD						
UD	-0.499***					
AR	0.035	-0.048				
MB	-0.216***	0.468***	-0.404***			
PPER	0.544***	-0.322***	0.161***	-0.283***		
SSS	0.004	-0.004	-0.144***	0.065	0.004	
PO	0.083*	-0.019	-0.574***	0.316***	-0.001	0.176***

Note: N = 638; DD, Downward Dummy; ID, Immobility Dummy; UD, Upward Dummy; AR, Attitudes toward Redistribution; MB, Meritocratic Beliefs; PPER, Perceived Personal Economic Risk; SSS, Subjective Socioeconomic Status; PO, Political Orientation; M, mean; SD, standard deviation; *p < 0.05, **p < 0.01, ***p < 0.001

S7

Table S7

Contrast coding for experimental conditions

	Contrast 1	Contrast 2	Contrast 3
Downward Condition	-1	0	-1
Immobility Condition	0	-1	1
Upward Condition	1	1	0

Note: Contrast 1, Upward Condition vs. Downward Condition; Contrast 2, Upward Condition vs. Immobility Condition; Contrast 3, Downward Condition vs. Immobility Condition