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Social mobility beliefs and attitudes toward redistribution: Potential explanatory mechanisms

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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

downward social mobility, meritocracy beliefs, perceived personal economic risk, redistribution, upward social mobility

INTRODUCTION

The economic gap between the richest and the poorest is continuing to grow around the world (Christensen et al., 2023). Redistributive policies are recognized as one of the most effective routes for reducing economic inequality (Alvaredo et al., 2018; Piketty, 2015) and its aversive personal, interpersonal, and societal consequences (Sánchez-Rodríguez et al., 2019;

Willis et al., 2022). However, although higher levels of economic inequality are associated with greater support for government intervention (Evans & Kelley, 2018; Schmidt-Catran, 2016), people often fail to support 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, many 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; Piketty, 1995). Interestingly, other research has suggested that believing that it is possible to move up the social ladder influences attitudes toward redistribution (Garcia-Muniesa, 2019; Shepelak, 1989).

Nevertheless, the relationship between various types of social mobility beliefs (e.g., 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. This research sought to investigate the relationship between upward and downward social mobility beliefs and attitudes toward redistribution, also 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). Social sciences have tried to explain people's motivation for supporting (or not) redistribution policies. One of the most endorsed perspectives is the Rational Choice Theory, which suggests that people support redistribution as 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 some factors other than rational 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. 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; Rodriguez-Bailon et al., 2017). In this regard, the Wealth Paradox research (Mols & Jetten, 2016, 2017) highlights the difficulty of understanding real-world patterns, such as voting behavior, solely through rational actor models. This underlines the complexity of factors influencing attitudes toward redistribution, suggesting that self-interest, socioeconomic status, and ideological orientation are only part of the broader picture.

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. 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; Rodriguez-Bailon et al., 2017).

Social psychology distinguishes various types of social mobility (Davidai & Wienk, 2021; Day & Fiske, 2019); for example, according to time frame (past, current, or future), trajectory (upward or downward), or 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 al., 2022; Davidai & Gilovich, 2015, 2018; Matamoros-Lima et al., 2023; Melita et al., 2023).

Objective social mobility plays a role in predicting differences in preferences for redistribution regardless of the person's SES (Alesina et al., 2018; Alesina & La Ferrara, 2005; Benabou & Ok, 2001; Piketty, 1995), 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; Mérola & 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 future did not show increased support for progressive taxation.

These results suggest that just the *belief* in the likelihood of socioeconomic 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). Psychology has highlighted the importance of subjective (vs. objective) reality in explaining human behavior (Adler et al., 2000; Davidai et al., 2012; Willis et al., 2022). Although preferences for redistribution may therefore depend on subjective social mobility, 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 *status quo*, reinforcing system-justifying ideologies. 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. Upward social mobility is often related positively to meritocracy (Day & Fiske, 2017; Matamoros-Lima et al., 2023; Mijs, 2022), being possible that upward mobility beliefs increase meritocratic beliefs, thus decreasing attitudes toward redistribution.

Regarding downward social mobility beliefs, the potential psychological mechanisms that may explain their effects may be related with 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. 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 toward redistribution.

Overview of this 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). 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 (Organization for Economic Co-operation and Development [OECD], 2022). However, the two countries show differences in redistributive policies. Although in both countries, the richest receive more public transfers than the poorest, this gap is greater in the Italian context (OECD, 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, 2023). Preregistrations, data, code to reproduce analyses, materials, and supplementary material are available at OSF (Link).

STUDY 1

Study 1 was aimed at investigating the relationship between upward and downward societal mobility beliefs and attitudes toward redistribution, as well as potential psychosocial mechanisms. 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 procedure

Data were collected 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 $r \geq .07$ (alpha level = .05, 80% power). The study received 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"). 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 ($\alpha_{\text{Chronbach}} = .81$).

Bidimensional social mobility beliefs scale

We used an abridged form of the bidimensional social mobility beliefs scale (Matamoros-Lima et al., 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"; $\alpha_{\text{Chronbach}} = .87$) 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"; $\alpha_{\text{Chronbach}} = .84$) 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

Two items (Castillo et al., 2019) measured descriptive meritocratic beliefs (i.e., "In Spain people are rewarded for their efforts"; "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 ($\alpha_{\text{Chronbach}} = .77$; $r_{\text{meaninter-item}} = .63$), 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., 2015) 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 ($\alpha_{\text{Chronbach}} = .88$; $r_{\text{meaninter-item}} = .79$).

Sociodemographics

Participants provided information about their 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

Preregistered hypotheses

Zero-order correlations among variables were performed (Table S3). Upward societal mobility beliefs correlated positively with meritocratic beliefs ($r = .25$, $p < .001$), and negatively with perceived personal economic risks ($r = -.08$, $p < .001$) and attitudes toward redistribution ($r = -.12$, $p < .001$). Also, downward societal mobility beliefs correlated negatively with meritocratic beliefs ($r = -.10$, $p < .001$), and positively with perceived personal economic risks ($r = .19$, $p < .001$) and attitudes toward redistribution ($r = .15$, $p < .001$). Therefore, Hypotheses 1 and 2 were confirmed. As a robustness check (see Table S4), we ran a hierarchical multiple regression analyses using mobility beliefs and attitudes toward redistribution as criterion variable (model 1a). In the second step, we added meritocratic beliefs and perceived personal economic risks (model 1b). Finally, we included demographic variables (age, gender, income, subjective socioeconomic status, and political orientation; model 1c). Results were in line with preregistered Hypotheses 1 and 2.

To test Hypotheses 3 and 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). A significant indirect effect of meritocratic beliefs emerged (IE = −.05, SE = .01, $p < .001$, 95% CI [−.08, −.04]). We then tested the indirect effect of beliefs about downward societal mobility on attitudes toward redistribution through perceived personal economic risks (Figure 2). Results revealed a significant indirect effect of perceived personal economic risks (IE = .02, SE = .00, $p = .001$, 95% CI [.01, .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, perceived personal economic risks, subjective socioeconomic status, and political orientation (H3: IE = −.02, SE = .00, $p < .001$, 95% CI [−.03, −.01]). Also, the indirect effect of downward societal mobility beliefs (H4) remained even controlling for upward societal mobility beliefs, meritocratic beliefs, subjective socioeconomic status, and political orientation (H4: IE = .01, SE = .00, $p = .01$, 95% CI [.00, .02]).

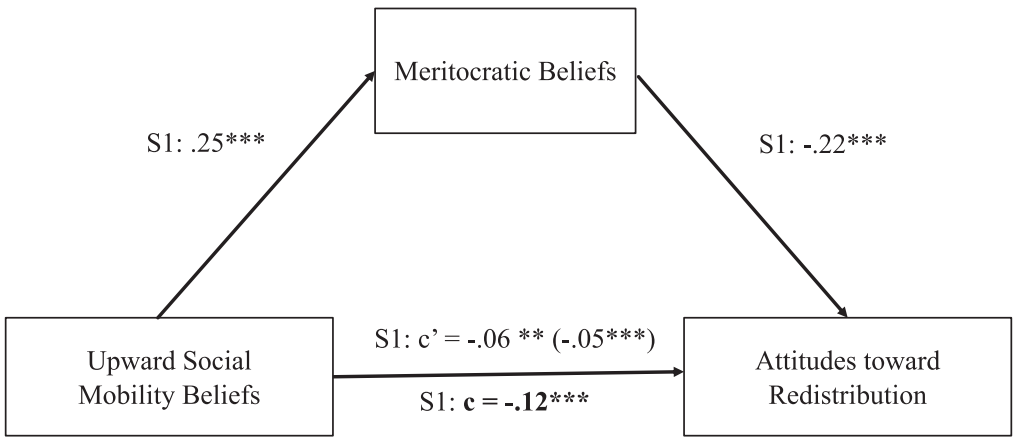

FIGURE 1 Meritocratic beliefs mediate effect of upward social mobility beliefs on attitudes toward redistribution. Indirect effect in brackets. Total effect in bold; Study 1 (Spain); $^{**}p < .05$; $^{***}p < .001$. Bootstrap = 5000.

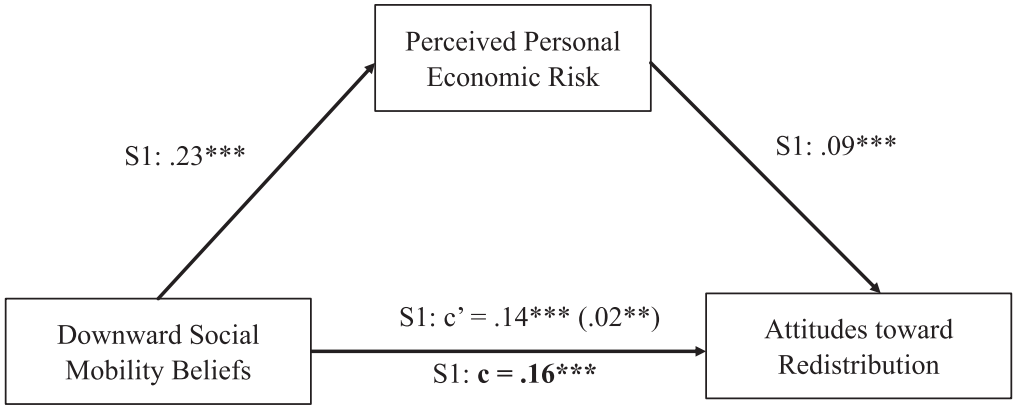

FIGURE 2 Perceived personal economic risk mediate effect of downward social mobility beliefs on attitudes toward redistribution. Indirect effect in brackets. Total effect in bold; Study 1 (Spain); $^{**}p < .05$; $^{***}p < .001$. Bootstrap = 5000.

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 worsen their social position.

Study 1 also 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. In addition, we found that downward societal mobility beliefs have an indirect effect on attitudes toward redistribution through perceived personal economic risks. 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). We predicted upward societal mobility to have an indirect effect on attitudes toward redistribution through meritocratic beliefs (H1), whereas downward societal mobility beliefs to have an indirect effect on attitudes toward redistribution through perceived personal economic risks (H2).

Method

Participants and procedure

Italian participants were contacted through a participant-recruiting company (Prolific) and authors' social networks (Facebook and Twitter). Paid advertisements were not employed to expand the reach of our recruitment efforts. 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 S5).

We calculated a priori the minimum sample size needed (with alpha level = .05 and power of .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[1]

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 et al., 2024. 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 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"; "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 sociodemographics.

Attitudes toward redistribution scale

This 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*). We used mean scores with higher values of the scores reflecting more positive attitudes toward redistribution ($\alpha_{Chronbach}$ = .68).

Meritocracy beliefs scale

This scale (García-Sánchez et al., 2022) is composed of six items aimed at assessing meritocratic beliefs (e.g., "If people work hard they do get what they want") on 7-point Likert scales

[1]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 toward redistribution and meritocratic beliefs), and all scales present a lower number of items with respect to the original scales.

ranging from 1 (*totally disagree*) to 7 (*totally agree*). We used mean scores with higher values reflecting a greater endorsement of meritocratic beliefs ($\alpha_{\text{Chronbach}} = .93$).

Perceived personal economic risks scale

This scale (Marjanovic et al., 2015) 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*). We used mean scores with higher scores indicating higher perceived personal economic risks ($\alpha_{\text{Chronbach}} = .91$).

Sociodemographics

Participants provided information about their 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 S6, mobility condition (0 = downward societal mobility; 1 = upward societal mobility) correlated positively with meritocratic beliefs ($r = .67$, $p < .001$), and negatively with perceived personal economic risk ($r = -.72$, $p < .001$) and attitudes toward redistribution ($r = -.20$, $p < .001$).

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 ($M = 6.41$; $SD = .92$) compared to the downward societal mobility condition ($M = 2.58$; $SD = 1.42$), $t(299) = -21.84$, $p < .001$, $d = -2.52$, 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 ($M = 2.85$; $SD = 1.77$), $t(327) = 20.79$, $p < .001$, $d = 2.39$, 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 ($M = 5.57$; $SD = .88$) on attitudes toward redistribution, $t(288.53) = 3.66$, $p < .001$, $d = .42$, 95% CI [.20, .66].

Preregistered hypotheses

To test Hypotheses 1 and 2, two mediation analyses (Model 4, bootstrapping 5.000 samples, 95% CI; Hayes, 2013) were conducted using *lavaan* package (Rosseel, 2012). Experimental conditions (0 = downward societal mobility and 1 = upward societal mobility) were entered as predictors.[2]

[2]Due to an error in the preregistration of Study 2, we preregistered that we would use manipulation checks (MC) as predictor variables. However, following the recommendation of one of the reviewers and considering the error, we decided to deviate from this approach and use the experimental conditions as predictor variables instead. Importantly, the results remain consistent regardless of whether MC or experimental conditions are used as predictors.

Mobility condition had an indirect effect on attitudes toward redistribution through meritocratic beliefs (H1: IE = −.50, SE = .10, $p < .001$, 95% CI [−.71, −.31]) and perceived personal economic risks (H2: IE = −.34, SE = .11, $p = .004$, 95% CI [−.57, −.10]). The effect of upward societal mobility condition (H1) was significant even after controlling for perceived personal economic risks, subjective socioeconomic status, and political orientation (H1: IE = −.20, SE = .09, $p = .001$, 95% CI [−.61, −.22]). However, the indirect effect of downward societal mobility condition (H2) was not significant when we controlled for meritocratic beliefs, subjective socioeconomic status and political orientation (H2: IE = −.13, SE = .08, $p = .115$, 95% CI [−.30, .02]).

Discussion

In Study 2, a significant difference on attitudes toward redistribution emerged depending on the type of activated beliefs about social mobility: Participants in the downward societal mobility condition 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, allowing 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 influenced 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, and downward societal mobility). 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, upward social mobility would increase meritocratic beliefs (Path a) and 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, 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, 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, downward social mobility would increase perceived personal economic risks (Path a) and perceived personal economic risks would increase attitudes toward redistribution (Path b).

Method

Participants and procedure

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 .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 S5). 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 to) 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., 2015; $\alpha_{Chronbach} = .92$), the attitudes toward redistribution scale (Dawtry et al., 2015; $\alpha_{Chronbach} = .69$), and provided sociodemographics.

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 ($M = 2.15$; $SD = 1.34$), $F(2,635) = 622.57$, $p < .001$, $\eta^2 = .66$, 95% CI [.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 ($M = 2.97$; $SD = 1.76$), $F(2,635) = 284.41$, $p < .001$, $\eta^2 = .47$, 95% CI [.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 ($M = 2.36$; $SD = 1.55$); $F(2,635) = 537.76$, $p < .001$, $\eta^2 = .62$, 95% CI [.59, 1.00].

Preregistered 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: $M = 5.59$; $SD = 1.06$), $F(2,635) = .92$, $p = .39$, $\eta^2 = .003$, 95% CI [.00, 1.00].

To test Hypotheses 2 and 3, we conducted four mediation analyses (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 S7; Hox et al., 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 = −.22, SE = .02, $p < .001$, 95% CI [−.28, −.17]) and societal immobility condition (H2b: IE = −.25, SE = .03, $p < .001$, 95% CI [−.31, −.19]). Then, we tested the indirect effect of downward mobility condition (H3a: vs. upward condition; H3b: vs. immobility condition) on attitudes toward redistribution through perceived economic risks. A significant indirect effect of downward mobility condition emerged, both when compared to the upward mobility (H3a: IE = −.12, SE = .03, $p < .001$, 95% CI [−.18, −.05]) and immobility condition (H3b: IE = −.11, SE = .02, $p < .001$, 95% CI [−.17, −.06]). A robustness check showed that all indirect effects remained even controlling for perceived economic risks, meritocratic beliefs, participants' subjective socioeconomic status, and political orientation: H2a: IE = −.11, SE = .02, $p < .001$, 95% CI [−.16, −.07]; H2b: IE = −.13, SE = .02, $p < .001$, 95% CI [−.18, −.08]; H3a: IE = −.08, SE = .02, $p = .001$, 95% CI [−.12, −.03]; H3b: IE = −.05, SE = .02, $p = .025$, 95% CI [−.09, −.00].

Discussion

The difference between upward and downward societal mobility on attitudes toward redistribution found in Study 2 (H1) was not replicated. This could be due to the high correlation emerged in Study 3 between attitudes toward redistribution and political orientation. When we controlled for the political orientation effect, we found a significant difference in attitudes toward redistribution between upward and downward mobility conditions.[3]

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 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 mediator of the relation between downward societal mobility (vs. upward vs. immobility condition) and attitudes toward redistribution.

[3]ANCOVA adjusting for Bonferroni showed a significant difference in attitudes toward redistribution between the downward and upward mobility conditions, $t(628) = 2.54$, $p = .03$, $d = .24$, 95% CI [.05, .44].

GENERAL DISCUSSION

In this research, we investigated 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. 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., 2022; Matamoros-Lima et al., 2023) with different consequences (Melita et al., 2023), thus expanding on the evidence on social mobility beliefs and their consequences (Davidai & Wienk, 2021; Matamoros-Lima et al., 2023; Melita et al., 2023).

Another contribution of this work concerns the focus on people's beliefs (Alesina et al., 2018; Alesina & La Ferrara, 2005; Benabou & Ok, 2001). Studies have shown that experienced upward and downward social mobility may affect people's support toward redistribution policies (Mérola & Helgason, 2016; Schmidt, 2010). However, recent results (Garcia-Muniesa, 2019) have suggested that social mobility beliefs, even controlling for 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. More importantly, our findings show that when people believe that it is likely 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 al., 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; Olivera, 2014).

Self-interest theory (pocketbook interest) may explain this cognitive process (Durante et al., 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 support for redistributive policies (Corneo & Grüner, 2002; Fong, 2001), such as system-justifying ideologies (García-Sánchez et al., 2020; Jost et al., 2015; Jost & Hunyady, 2005; Matamoros-Lima et al., 2023), especially when people believe in upward mobility. 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).

Our results are related to The Paradox of Wealth (Mols & Jetten, 2017). Similar to Jetten et al. (2015), we found that anticipating relative gratification (upward societal mobility expectations) and relative deprivation (downward societal mobility expectations) can influence people's social beliefs, such as attitudes toward redistribution. However, unlike Jetten et al. (2015), in the original Bimboola paradigm, our participants were assigned to the same income group (Group 3) and, therefore, did not permit us to explore potential differences in social mobility beliefs among different income groups using the Bimboola paradigm. Future research could investigate whether the relationship between beliefs in mobility and attitudes toward redistribution varies as a function of participants assigned socioeconomic status. In other words, whether, for example, it follows a linear or inverted U-shape.

Future studies could also explore other variables related to social mobility. Thus, a long-running discussion has been about how pocketbook (personal) and socio-tropic (collective) interests can shape people's political attitudes (Compton & Lipsmeyer, 2019). Our research does not allow us to directly answer this question. In the case of beliefs about mobility, we studied only beliefs about societal mobility, and future research could analyze whether the results are replicated with personal mobility beliefs. Regarding perceived economic risks, our measures only focus on personal risks (related to "egoistic" relative deprivation); future research could analyze whether the effects are the same with measures of collective risks (related to fraternalistic relative deprivation).

Related to the previous idea, there has been a long-running debate in political science about whether nativist parties with welfare chauvinist policy proposals ("own nation first") attract voters motivated by personal "egoistic" self-interest or by collective "socio-tropic" self-interest. Prior studies suggest that populist right wing parties (PRWP) try to promote a specific normative climate (Mols & Jetten, 2020). For example, during periods of economic prosperity (upward normative climate), PRWP leaders seek to foster normative climates aimed at undermining trust in the meritocratic system (e.g., "there is an alliance between the bottom and a wealthy elite against ordinary people"). Conversely, during economic crises (downward normative climate), they aim to create symbolic threats (e.g., "us" vs. "immigrants"; Mols & Jetten, 2016). In this way, future research could focus on how nativist parties appeal to their voters with welfare chauvinist policy proposals.

This research also has implications from an applied point of view. Our findings show that people were less likely 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 to promote 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 toward 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., Mérola & 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 et al., in press). Besides this, it will also be important to replicate these models in various contexts, as well as to investigate 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. For instance, the neoliberal ideology (opposition to government interventions in the free market; Hartwich & Becker, 2023) or the moral conviction about reducing economic inequality (Scatolon & Paladino, 2023). Therefore, future studies could investigate whether the negative effect of beliefs in upward mobility on redistributive policies is lower for people with low support for neoliberalism and a high moral conviction about reducing economic inequality.

Some research has pointed out that social mobility effects may be due to citizens' socioeconomic status rather than social mobility beliefs (Ciccolini & Härkönen, 2021; Van Der Waal et al., 2017). The person's social position of origin (status departure; e.g., the status of the birth family) and/or the destination position (status attained; e.g., higher status achieved in relation with status origin) may be confused with the social mobility effects per se (i.e., movement from status origin to status destination). Future studies should replicate the effects of this 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 have found 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 understanding why some people support redistributive policies and others do not; and (b), importantly, how different mechanisms may explain support (or not) for redistributive policies. These results have important implications for the design of policies to reduce economic inequality.

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SUPPORTING INFORMATION

Additional supporting information can be found online in the Supporting Information section at the end of this article.

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