

FORS<sup>+</sup> GUIDES

to survey methods  
and data management



# Measurement of social position in surveys

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**Abstract:**

This guide is addressed to scholars who collect, or simply use, information on social position. It presents the main concepts and schools of thought in the field, addresses the main decisions that have to be taken for the measurement of social position, and gives an overview of the various implementations of the concept in the surveys conducted by FORS.

**Keywords:** social class, social status, social stratification, Switzerland

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## 1. INTRODUCTION

The measurement of social position is a key methodological aspect of the study of social stratification and inequality. In this framework, some important distinctions must be highlighted. The traditional distinction between inequality of opportunity and inequality of condition (Breen & Jonsson, 2005) tends to hide the central issue of social structure (occupational and/or class structure, gender stratification, etc.). Only social structure gives full meaning to the mentioned dimensions of stratification research: analysing inequality of opportunity basically means analysing mechanisms that distribute individuals into social positions that constitute the social structure; studying inequality of condition means studying the distribution of (valuable) goods and outcomes associated with those positions (Budowski & Tillmann, 2014). In any case, it is crucial to define the position in the social structure, i.e. the social position.

The present guide presents the main concepts and schools of thought and addresses key aspects of the measurement of social position in chapter two. Chapter three gives an overview of various implementations of the concept in the surveys conducted by FORS. Chapter four discusses some implications for practitioners and questionnaire construction.

## 2. APPROACHES AND ASPECTS OF SOCIAL POSITION(S)

### 2.1 APPROACHES TO SOCIAL POSITION(S)

The history of stratification theory is mainly a history of debates about class, status, and prestige hierarchies (Grusky, 2001). In relatively recent stratification research, various main approaches and operationalisations, competing but potentially complementary, to social class exist: neo-Marxist class analysis, neo-Weberian, neo-Durkheimian (micro-class analysis), Bourdieu's class in social space, and rent-based class analysis<sup>1</sup> (Wright, 2005). Parallel to this tradition, researchers have developed and used gradational approaches of social standing such as prestige scales, socioeconomic scales or social interaction and stratification scales.

#### **Neo-Weberian class analysis**

This perspective is widely used, in particular in (comparative) social mobility research. Classical pieces in this field are Erikson and Goldthorpe (1992) and Breen (2004). The Erikson-Goldthorpe-Portocarero (EGP) class scheme is based on employment relations. Basic distinctions are made between employers, self-employed, and employees. Furthermore, a level of differentiation is added to the employment relations of employees depending on their employment contracts, namely between *labour contract* on the one hand, and *service relationship* on the other hand. On this theoretical basis, one version of the schema, widely used, comprises seven categories: service class, routine non-manual workers, petty bourgeoisie, farmers, skilled workers, non-skilled workers, agricultural labourers (Erikson & Goldthorpe, 1992, pp. 38-39). Table 1 shows the different aggregations of the EGP class schema according to Breen (2005).

*Table 1. Possible Aggregations of the EGP class schema.*

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<sup>1</sup> To our knowledge, this last type of class analysis does not correspond to a particular class schema (largely) used in quantitative survey research. Thus, it is out of the scope of this guide.

11-class (maximally disaggregated) version	7-class version	4-class version
I Upper service class	I Upper service class	I + II Service class
II Lower service class	II Lower service class	
IIIa Routine non-manual employees, higher grade	III Routine non-manual	IIIa + V Intermediate class
IIIb Routine non-manual employees, lower grade		IIIb + VI + VII Manual class
IVa Small proprietors with employees	IV Petty-bourgeoisie	IV Petty-bourgeoisie
IVb Small proprietors without employees		
IVc Farmers and other self-employed workers in primary production		
V Lower grade technicians and supervisors of manual workers	V Technicians and supervisors	
VI Skilled manual workers	VI Skilled manual	
VIIa Semi- and unskilled manual workers (not in agriculture)	VII Non-skilled manual	
VIIb Semi- and unskilled manual workers in agriculture		

Source: Breen (2005)

This class scheme has been largely discussed and criticized. Despite this, it inspired the creation of the European Socio-economic Classification (ESeC) (see Rose & Harrison, 2012 and [The European Socio-economic Classification](#)<sup>2</sup>). The Oesch class schema (Oesch, 2006) can be seen as a schema of this tradition taking into account contemporary characteristics of the labour market, including different work logics. This schema is frequently used in electoral studies.

### **Bourdiesan class analysis (and socio-professional categories)**

Bourdieu (1984) conceptualizes society as a *social space*. In this theoretical framework, social agents are, first, distributed in the space on the basis of their overall volume of capital; at this level, three major classes (of conditions of existence or of living conditions) are distinguished: the dominant class, the middle-class or petit-bourgeoisie, and the working or popular classes. Second, agents are positioned according to differences in capital composition, that is the type of capital (mainly economic versus cultural) that dominates in their overall volume of capital. This distinction creates class-fractions such as the dominant (economic capital +, cultural capital -) and dominated (economic capital -, cultural capital +) fractions of the dominant class. These two dimensions (volume and composition of capital) define the basic structure of the social space. A third (dynamic) dimension being constituted by the evolution in time of the volume and

<sup>2</sup> <https://www.iser.essex.ac.uk/archives/esec/user-guide/the-european-socio-economic-classification>

composition of (individual or collective) capital. Different operationalisations exist; however, in Bourdieu's and French followers work, socio-professional categories (*catégories socio-professionnelles*) are often empirically used (as a proxy), but see also Savage (2015) or Atkinson (2017). This approach is quite alive and debated in journals (see, for example, *Sociology*, 48-3, 2014; *European Societies*, 20-3, 2018; *The British Journal of Sociology*, 70-3, 2019). There is a Swiss version of socio-professional categories (CSP-CH) (Levy, Joye, Guye, & Kaufmann, 1997). Table 2 shows the basic version of the CSP-CH. The Federal Statistical Office provides a more recent and revised version ([Socio-Professional Categories 2010 - SPC 2010<sup>3</sup>](#)).

Table 2. CSP-CH Classification Schema.

Education	University	Technical and professional	Apprenticeship	Compulsory education at most
Position				
Top executives	Top executives			
Self-employed	Liberal professions	Self-employed		
Wage-earners	Intellectuals and managers	Middle employees	Skilled non-manuals	Unskilled
			Skilled manuals	

Source: Levy & Joye (1994)

### Neo-Durkheimian (micro-class analysis)

The previous approaches, as well as the neo-Marxist approach (see below), are contested by postmodernist critics of class analysis. Instead of following the idea of the end of social class (along with the mentioned critics) as a predictor of life chances, attitudes and behaviours, micro-class analysts argue that conventional (neo-Marxist and neo-Weberian) class analysis is vulnerable because their models are abstract statistical constructions (Weeden & Grusky, 2005). Consequently, they ignore the institutionalized occupational boundaries at the work place that actually shape life chances, attitudes and behaviours. Here too, the debate has been intense between "occupational" social scientists and "traditional" class analysis (see, for example, Goldthorpe, 2007, pp. 125-153 or Wright, 2015, pp. 113-125). In any case, measuring micro-classes implies using occupational or disaggregated ISCO codes<sup>4</sup>, which means having (very) large samples.

### Neo-Marxist class analysis

At least in quantitative research, Wright (1997) is the main representative of this tradition<sup>5</sup>. He was concerned with the development of a Marxist class schema for contemporary societies, that is with the breakdown of the working class due to the increase of the middle class(es) conceived as *contradictory class locations*, i.e. having contradictory interests as a class (like workers, they are exploited by capitalists, like capitalists they dominate and control workers). His views and the strengths and weaknesses are largely discussed in Wright (1989). This schema took two major

<sup>3</sup> <https://www.bfs.admin.ch/bfs/en/home/statistics/work-income/nomenclatures/spk2010.html>

<sup>4</sup> see <http://www.ilo.org/public/english/bureau/stat/isco/>

<sup>5</sup> see <https://ssc.wisc.edu/~wright/>

forms mainly depending on the importance given to the concept of *exploitation* versus *domination*. The more recent schema (Wright II) includes twelve (sub)classes: three owner classes differentiated according to the extent of ownership, and nine wage labourer classes divided following the dimensions of skill on the one hand, relationship to authority on the other hand (see Table 3). Wright III is a simplification of Wright II often used due to data and/or sample size limitations.

Table 3. Wright II Class Schema.

<b>Number of employees</b>	<b>Relation to means of production</b>						<b>Relation to authority</b>
		<b>Owner</b>	<b>Employees</b>				
	<b>Many</b>	Capitalists	Expert managers	Skilled managers	Non-skilled managers	<b>Managers</b>	
	<b>Few</b>	Small employers	Expert supervisors	Skilled supervisors	Non-skilled supervisors	<b>Supervisors</b>	
<b>None</b>	Petite bourgeoisie	Experts	Skilled workers	Non-skilled workers	<b>Non-management</b>		
		<b>Experts</b>	<b>Skilled</b>	<b>Non-skilled</b>			
<b>Relation to scarce skills</b>							

Source: Wright (1997)

**Gradational approaches**

Gradational approaches of social standing have been developed for a long time. Unlike previous (categorical) approaches, these kinds of measures are continuous scales often constituted by a ranking (of a combination) of occupation, education, and income (for an overview, see Hauser & Warren, 1997). Standard references in this field are Duncan’s socio-economic index (based on education and income) used in Blau and Duncan (1967) and Treiman’s (1977) index of occupational prestige scale. For a more recent version, see Ganzeboom and Treiman (1996). Moreover, social interaction and stratification scales have been developed (see [CAM SIS: Social Interaction and Stratification Scales](http://www.camsis.stir.ac.uk/)<sup>6</sup>). The CAMSIS approach is quite original in its theoretical foundations defining the basic unit of analysis within social stratification by interdependent relationships within social networks (recent piece of work Lambert & Griffiths, 2018, see also Meraviglia, Ganzeboom, & De Luca, 2016). For a Swiss context see Bergman, Lambert, Prandy, and Joye (2002).

<sup>6</sup> <http://www.camsis.stir.ac.uk/>

## Other approaches

Social position (or social class) has also a subjective dimension (often named *class consciousness*). Thus, as a complement or as such, scholars use sometimes measures of class identification/identity and/or subjective perception of class interests.

Finally, for different reasons (notably disciplinary or empirical), researchers use some income measure or a (categorical or continuous) measure of level of education achieved (see Connelly, Gayle, & Lambert, 2016 for a review).

## 2.2 REFERENCE POPULATION

In general, the previous measures are occupation-based classifications or scales recognizing that paid work is an important foundation of social stratification. Therefore, the question arises of how to proceed with persons/households out of the labour market (mainly unemployed, retired and homemakers). In this regard, several options are traditionally considered when focusing on the population as a whole: (1) classifying individuals according to their last occupation, (2) according to their spouse's occupation, or (3) according to their situation outside the labour market (training, unemployment, retirement, at home). These strategies have the advantage of including the whole population. However, they can refer to information that is already dated, ignore inequalities within households and cover heterogeneous situations. When collecting data, it is necessary to know whether the whole population should be included. Indeed, the information to be collected varies according to this decision and the research questions being considered.

## 2.3 INDIVIDUAL OR HOUSEHOLD AS UNIT OF MEASUREMENT AND ANALYSIS

As a unit of classification and analysis you can either choose the individual or the household. This issue is much debated, particularly about the position of women in the tradition of class analysis (see, for example, Sørensen, 1994). According to the more conventional approach, it is the household, seen as a place of pooled resources, which constitutes the basic unit for assigning a class position to all its members. Thus, it is assumed that the members of the same household occupy a similar class position; the latter being defined by the situation of the person integrated into the labour market which is often still a man. The validity of this approach has been challenged on three levels (Lemel, 2004, pp. 62-65). Firstly, it is based on the family couple model (or male breadwinner model); however, the demographic evolution is such that a non-negligible part of the population is not attached to such a family. Therefore, the class position of the members of this part of the population can only be defined on the basis of their own situation on the labour market. Secondly, even within couples, the generalisation of women's professional activity makes it possible to classify them according to their own situation in many cases. Thirdly, the idea of the household as a place of pooled resources hides gender inequalities in access to resources. Criticisms of the conventional approach have led to several alternative methods for defining the class position of a family, but also to the abandonment of the family as the unit of analysis in favour of an individual approach (for a synthesis, see Szelenyi, 2001). No single approach is universally agreed today; empirically, it may depend on the research question to define the approach that should be chosen (Levy et al., 1997, p. 127).

### 3. IMPLEMENTATION OF SOCIAL POSITION(S) IN SURVEYS

The review is limited to the main surveys carried out by FORS, namely the European Social Survey (ESS), MOSAiCH-ISSP, the Swiss Election Study (Selects), the Survey of Health, Ageing and Retirement in Europe (SHARE), the Swiss Household Panel (SHP), and Voto. Table 4 presents the variables of social position available in the various data sets.

*Table 4. Implementation of social positions in the main FORS surveys.*

	Neo-Marxist class analysis	Neo-Weberian class analysis	Neo-Durkheimian (micro-class analysis)	Bourdieuian class analysis (and socio-professional categories)	Gradational approaches
ESS	-	-	ISCO	-	-
MOSAiCH-ISSP	-	-	ISCO	-	-
Selects	-	Oesch class schema	ISCO	-	-
SHARE	-	-	ISCO	-	-
SHP	Wright III	EGP ESeC	ISCO	CSP-CH	Treiman prestige scale CAMSIS scale
Voto	-	-	-	-	-

The SHP covers, more or less completely, all the approaches mentioned in this guide. ESS delivers only the ISCO classification in data sets, but researchers can access syntaxes that allow the construction of many social class schemes (see [Computing Social Class Indices](http://www.europeansocialsurvey.org/docs/methodology/ESS1_social_class.pdf)<sup>7</sup>). Regarding political surveys, Selects provides ISCO and the Oesch class schema, whereas Voto disregards such variables. Finally, SHARE and MOSAiCH-ISSP data contain ISCO classification. Thus, the ISCO classification is the most common information in datasets listed in table 4 (as a standard classification of occupations and not as a statement for micro-class analysis). In addition to ISCO, except for Voto, the mentioned surveys contain at least information on occupation, employment status and level of education. That is to say that researchers can construct themselves most of the variables considered here. However, the absence of these stratification variables in some datasets may favour a biased (underestimated) view of the role of social position in contemporary society.

<sup>7</sup> [http://www.europeansocialsurvey.org/docs/methodology/ESS1\\_social\\_class.pdf](http://www.europeansocialsurvey.org/docs/methodology/ESS1_social_class.pdf)

## 4. IMPLICATIONS FOR QUESTIONNAIRE CONSTRUCTION AND ANALYSIS

When constructing a questionnaire, it is important to think about the following main elements:

*Recommendation 1* – What information is needed to construct the social classifications that the research intends to use? To this end, existing technical documents and questionnaires should be consulted. The minimum information to be collected being past and/or current occupation (or ISCO codes at a disaggregated level, 3 or 4 digits), the type of employment relationship (owners, self-employed, employee), and the number of employees for owners and self-employed.

*Recommendation 2* – What is the research reference population? In the case of the general population, the questionnaire will include questions about respondent's last employment status if outside the labour market and/or spouse's employment (see recommendation 1).

*Recommendation 3* – What is the unit of measurement and analysis? In the case of the household, information on all household members should be collected.

*Recommendation 4* – If social mobility plays a role, information on parents and/or on respondents' social trajectory over the life course should be noted.

When analysing (secondary) data, it may be important to:

*Recommendation 5* – Use (existing) various social classifications and conduct sensitivity analyses.

*Recommendation 6* – Avoid, for example, using the level of education and the CSP-CH, since the level of education is included in the construction of the CSP-CH.

## 5. FURTHER READINGS AND USEFUL WEB LINKS

Wright (2005) and Atkinson (2015) discuss different approaches and measures of social positions (social class). Connelly, Gayle and Lambert (2016) conduct a review of occupation-based social classifications for social survey research, and Lambert and Bihagen (2014) study the use of occupation-based social classifications.

The following internet links give access to syntaxes for building different classifications:

[http://www.europeansocialsurvey.org/docs/methodology/ESS1\\_social\\_class.pdf](http://www.europeansocialsurvey.org/docs/methodology/ESS1_social_class.pdf).

<https://www.statalist.org/forums/forum/general-stata-discussion/general/1506435-new-iscogen-package-available-from-ssc>.

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