

Publicado en: Rocío Fernández Ballesteros (Ed.): Encyclopedia of Psychological Assessment. Volume 2, M-Z. London: SAGE Publications Ltd, 2003, pp. 911-914.

SOCIO-DEMOGRAPHIC CONDITIONS

INTRODUCTION

The need for socio-demographic assessment derives from the fact that, in analysing the findings of social research, whether attitudes or behaviours, certain socio-demographic and socio-economic variables seem to have some explanatory power. Gender, age, occupation, family and/or household structure, education, income, rural-urban residence, and many other such variables, have shown to have a great importance because attitudes and behaviours generally vary according to the different categories in which groups of individuals tend to fall.

In this respect, it may be pertinent to recall that the concept of social status acquired a very concrete meaning in the social sciences after Ralph Linton defined it (Linton, 1936) as the position of an individual within a social system, to which society assigns certain attitudes and expectations of

behaviour that are known and accepted by everyone. Thus, when in a particular culture somebody is assigned as a 'mother', everybody within that culture will immediately attach certain attitudes and expectations of behaviour that define that 'status-role', and that need not be specified because they are of general knowledge. Linton differentiated, besides, between 'ascribed' and 'acquired' status. Ascribed status (as gender or age) is easily recognizable and therefore easily and soon assigned to individuals, so that they can learn quickly the attitudes and behaviours that are expected from a particular status. Acquired status (as occupation) is assigned to individuals only after they have demonstrated certain skills or after they fulfil certain requisites. The conceptual pair 'status-role' has been of great importance in sociological theory in order to refer to the structural or dynamic aspects of any social position within a social system (Bendix & Lipset, 1953; Davis & Moore, 1945;

Homans, 1953; Hughes, 1945; Hyman, 1942; Tumin, 1953).

The concept of socio-economic status developed later, mainly as a response to the Marxist concept of social class, defined in many varied ways by Marx himself in different writings (Marx, 1849, 1852), though Dahrendorf (1959) synthesized them many years later. Marx's concept of social class was not only very ideological, but also a clear oversimplification of social reality, and in addition, not easily 'operationalizable'. Those reasons seem to explain why non-Marxist sociologists, and especially North American sociologists, preferred to use less ideological and easy to operationalize concepts, like 'subjective social class' (social class with which one identifies oneself), or the many variations of 'objective social class', or more specifically, social stratification.

More acceptable to North American sociologists was the concept of social class elaborated by Max Weber (1922), who distinguished between social class based in economic aspects (like Marxism) or social estate (or strata) based on the social prestige of the different status. Similarly, Warner (1941-1959) came to the conclusion, when studying the social stratification systems in American cities based on the social relations of individuals, that there is no single system of stratification that might be universally applicable.

MEASUREMENT

Empirical social research during the past fifty years has demonstrated the great difficulties encountered in the operationalization of the Marxist concept of social class (even in agreeing on the abstract meaning of that concept). But there have been many attempts to operationalize the subjective concept of social class self-identification (based on the assessment made by the individual himself) and the more objective concept of socio-economic status (based on the supposedly more objective assessment made by the researcher).

Subjective Assessment

It has become a common practice in social research to use subjective and objective assessment of the different statuses of an individual. Thus, subjective assessment has become increasingly used to supplement the objective assessment of many

social positions (statuses) of individuals. Certainly, gender and age are objectively defined in most researches, but other statuses have been measured not only through objective indicators but also through more subjective indicators.

One example might be social class. Independently of a more objective attempt to define the social class to which an individual apparently belongs, it is increasingly common to recur to a subjective definition, that generally consists on asking the individual to identify him/herself with a particular social class. This is generally called subjective social class, and it may consist of a scale with three to seven or even more categories, depending on the researcher's preferences. Place of residence may also be defined subjectively, when the respondent is asked to answer whether he/she lives in an 'urban, semi-urban, or rural area', though the categories may vary in number and complexity.

Self-anchoring scales of ideology are generally preferred to more objective measurement of an individual's ideological orientation. Seven or 10-point scales, ranging from 'extreme left' to 'extreme right', are usually employed. Religiosity self-assessment scales are increasingly used in addition to more objective indicators of a person's religiosity or degree of religious practice. And a similar practice is also increasingly used for assessing the ethnic or 'national' self-identification of the respondent with a particular social group.

But subjective measurement has also a great significance in some apparently very objective socio-demographic assessment, as the employed-unemployed status. It is true that in most researches the respondent is asked to define him/herself as employed (part or full time) or unemployed according to very specific rules (hours worked per week, per month), but it is not less true that many respondents do not comply to those rules. A similar situation has also been found with respect to marital status, if some social and/or economic benefits depend from being married or unmarried. In all those cases the individual may be tempted to give a not very correct answer if some benefit may be derived from it.

Objective Assessment

In spite of the fact that subjective self-assessment by the respondent him/herself are increasingly

frequent, researchers use more objective indicators to assess most socio-demographic statuses of the respondents. Thus, even though gender is not any more the absolute 'ascribed' status that it was many years ago (individuals may identify themselves with a social gender different from the natural or physical gender, or they may even change their gender physically during their life time), gender is generally an objective status, especially at birth, when roles are assigned for early socialization.

Age continues to be a very objective status, though the concept of cohort or age group, or even generation, may have a more subjective component. Education is usually measured through several indicators, like total number of years of formal education, educational levels or degrees attained, age at which the individual stopped receiving formal education. Income is usually measured also through several indicators, like exact income received (annually, monthly) by the respondent (before or after taxes), family income, income categories, and the like. Place of residence may be objectively assessed on the basis of the number of inhabitants, population categories, social categories (village, town, suburb of big city, slum of big city, central city, and other categories). Occupation is measured, more and more frequently, through the ISCO coding categories, which may use up to four digits (9999 potential different occupations).

Very frequently compound indicators or indexes have been constructed on the basis of several indicators. One of the most common is the Socioeconomic Status index. In most cases this index is built on the basis of educational level, occupational prestige and individual's income, though some researchers also include some assessment of life styles (household appliances, house property, second residences, and the like). Each researcher will combine the categories of each individual indicator in a different manner, generally in accordance with his/her research goals.

Another widely used compound index is the Social Position index, developed by Galtung (1976), which combines eight dichotomized socio-demographic characteristics (gender, age, educational level, income level, occupation, sector of the economy, urban-rural residence, geographical centrality) in order to build a scale with nine categories. The peculiarity of this compound index is that it is very much linked to a theory (centre-periphery theory), though other

socio-demographic indicators, simple or compound, are also generally related to some theoretical construct.

FUTURE PERSPECTIVES AND CONCLUSIONS

Socio-demographic and socio-economic variables are important for analysing and interpreting survey findings on attitudes and behaviours. Their assessment, however, may be objective or subjective in most cases, as the examples given below show, and it is up to the researcher to decide which he/she prefers to use in each case. Both types of assessment are usually included in the same research, in many cases to show the correlation that may exist between the objective and the subjective measurements (see Table 1). But many socio-demographic variables are usually defined objectively, as happens with gender and age, among others.

The difficulties in the assessment of socio-demographic characteristics are, however, quite varied. In the first place, there is the difficulty of defining theoretically meaningful categories for each indicator and that of deciding whether to use objective or subjective indicators. Researchers will find a great variety of categories used in the literature for each particular indicator, regardless of it being objective or subjective. Secondly, as international comparative research is increasingly used, researchers find it difficult to agree on variables and categories for each variable that are comparable across countries. This is particularly true with respect to educational level, income level, ethnic or 'national' groupings, religious affiliation and practice, and the like. Third, even within a single country one may find that the operationalization of a particular concept has varied through time (the concept of primary education, for example, may mean a certain number of years of education for individuals pertaining to a particular cohort, but it may mean a different number of years for those belonging to another cohort, simply because the length of primary education may have changed through time) and therefore the meaning may be different for different respondents, without the researcher being aware of that problem. In fact, the main problems that researchers will find in assessing socio-demographic or socio-economic status are the general problems that have always

Table 1. Correlation between objective and subjective measurements

Abstract concept	Subjective assessment	Objective assessment
Social class	Self-identification with a social class, subjective social class	Socio-economic status
Religiosity	Self-evaluation of religiosity	Social position Church attendance, frequency of praying, etc.
Ideology	Self-anchoring scale of ideology	Ideological orientation to specific issues
Place of residence	R's definition	Size of place based on population
Ethnicity, national sentiment	Self-identification	Definition based on objective aspects
Employment status	Self-assessment	Defined on the basis of specific requirements

faced social scientists; that is, going from abstract concepts to concrete indicators, and trying to increase the scope of generalizations both in time and space.

References

- Bendix, R. & Lipset, S.M. (Eds.) (1953). *Class, Status and Power*. New York: Free Press.
- Dahrendorf, R. (1959). *Class and Class Conflict in Industrial Society*. Stanford: Stanford University Press.
- Davis, K. & Moore, W.E. (1945). Some principles of stratification. *American Sociological Review*, 10, 242-249.
- Galtung, J. (1976). Social position and the image of the future. In Ornaner, H., Wiberg, H., Sicinsky, A. & Galtung, J. (Eds.), *Images of the World in the Year 2000*, (pp. 381-402). The Hague: Mouton.
- Homans, G.C. (1953). Status among clerical workers. *Human Organization*, 12, 5-10.
- Hughes, E.C. (1945). Dilemmas and contradictions of status. *American Journal of Sociology*, 50, 353-359.
- Hyman, H.H. (1942). The psychology of status. *Archives of Psychology*, 38, (special issue).
- Linton, R. (1936). *The Study of Man: An Introduction*. New York: Appleton.
- Marx, K. (1849/1962). Wage labour and capital. In Marx, Karl & Engels, Friedrich *Selected Works*, Vol. 1 (pp. 70-105). Moscow: Foreign Languages Publishing House (First published in German in *Neue Rheinische Zeitung*).
- Marx, K. (1852/1962). The Eighteenth Brumaire of Louis Bonaparte. In Marx, Karl & Engels, Friedrich *Selected Works*, Vol. 1 (pp. 243-344). Moscow: Foreign Languages Publishing House (First published in German in *Die Revolution*).
- Tumin, M.M. (1953). Some principles of stratification: a critical analysis. *American Sociological Review*, 18, 387-394.
- Warner, W.L. (1941-1959). *Yankee City Series*, 5 Vols. New Haven: Yale University Press.
- Weber, M. (1922) (1957). *The Theory of Social and Economic Organization*. Glencoe, IL: Free Press (First published in German as Part 1 of *Wirtschaft und Gesellschaft*).

Juan Díez Nicolás

RELATED ENTRIES

FIELD SURVEY: PROTOCOLS DEVELOPMENT, SELF-REPORTS (GENERAL), SELF-REPORT DISTORTIONS, SELF-PRESENTATION MEASUREMENT