Distributive Justice and Subjective Social Position: Does Meritocracy Justify Income Inequality?

Justicia distributiva y posición social subjetiva: ¿la meritocracia justifica la desigualdad de ingresos?

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Abstract: This paper examines individual's evaluation of distributive justice in Chile. The objective is to explore how individuals' subjective social position affects their judgment of their own income and whether this judgment rests on a notion of merit. We use data from a vignette-based survey to analyze evaluations by a representative sample of people from three urban areas. The results show that an evaluation of unfairness with respect to their income prevails among the respondents, especially among those who identify themselves as belonging to the lower or lower-middle social stratum. These differences between subjective social positions become even more pronounced when individuals elaborate their judgment by including a meritocratic criterion based on the effort to educate themselves. However, no significant differences in justice evaluations are observed between objective social positions based on income or education. Our findings underscore the importance of subjective social position in people's evaluations of distributive justice.

Keywords: social inequality, social justice, distributive justice, vignette analysis, subjective social position.

Resumen: Este artículo se refiere a la evaluación de los individuos acerca de la justicia distributiva en Chile. El objetivo consiste en examinar cómo la posición social subjetiva de las personas afecta su juicio respecto a sus propios ingresos y si este juicio descansa en la

noción de mérito. Usamos datos provenientes de una encuesta basada en viñetas, para conocer las apreciaciones por parte de individuos de una muestra representativa de tres áreas urbanas. Los resultados muestran que entre los encuestados prevalece una evaluación de injusticia con respecto de sus ingresos, especialmente entre quienes se identifican como pertenecientes a un estrato social bajo o medio-bajo. Estas diferencias entre posiciones sociales subjetivas se hacen aún más fuertes cuando los individuos elaboran su juicio incluyendo un criterio meritocrático basado en el esfuerzo por educarse. Sin embargo, no se observan diferencias significativas en las evaluaciones de justicia al comparar entre posiciones sociales objetivas basadas en ingreso o educación. Nuestros hallazgos relevan la importancia de la posición social subjetiva en las evaluaciones que realizan las personas sobre la justicia distributiva.

Palabras clave: desigualdad social, justicia social, justicia distributiva, análisis de viñetas, posición social subjetiva.

Introduction

Social inequalities, and income inequality in particular, have significant consequences when perceived as injustices. In Latin America, historical systems based on land ownership, sex or gender, and ethnicity or race have generated marked inequalities that strongly correlate with the social positions that people occupy today in terms of their income. In recent years, the politicization of inequalities has been a major driver of social contestation. This shift began in the early twenty-first century with assertions that growing wealth inequalities around the world suggest that merit is far from being an engine of social mobility (World Inequality Lab, 2022).

One iconic case was the 2019 Chilean popular uprising, which unleashed multiple waves of protest and brought fierce violence and police repression. The demonstrations lasted for five months and triggered an institutional crisis of staggering proportions. Socio-economic unfairness was among the primary drivers of discontent and social mobilization, and situations that had become normalized over the years were suddenly redefined as inequalities. Among other issues, the low incomes of large sections of the population were reinterpreted as an injustice rather than a simple fact.

This article focuses on the subjective evaluation of distributive justice that individuals perform when they express who should receive what in terms of income. We analyze the topic from two perspectives. On

the one hand, we study individuals' evaluations of the unequal distribution of resources across society. On the other, we assess whether they share broadly held values such as the principle of equality of opportunity and individual merit (Dubet, 2022; Jasso, Törnblom & Sabbagh, 2016).

As such, from the perspective of pragmatic sociology, we examine attitudes toward distributive justice and ask what meanings individuals ascribe to it from their own subjective social positions (Boltanski & Thévenot, 2021). Sociology and social psychology have contributed reflections on the relationship between objective and subjective social position, and there is general agreement that measurements of the former conducted by experts may not correlate with the latter (Boltanski & Thévenot, 1983).

In light of this, the objective of the present article is to examine the degree to which individuals' subjective social position affects evaluations of unfairness regarding their incomes and, specifically, the inequalities they judge to be reflected in their income level and the legitimacy of merit to justify these disparities.

The present article is based on the analysis of a survey that we applied in 2021 during the crisis triggered by the popular uprising, where we used vignettes to reveal the judgments that people elaborate regarding income distribution in reference to their own situation. As the process required individuals to make evaluative judgments about themselves, it involved sensibilities that are best studied indirectly.

With this method, we measured the degree of unfairness that people identify in their evaluations of the incomes of different social strata, including their own, along with any changes in these evaluations when taking the notion of individual merit into consideration. The survey, applied to a representative sample of 1,620 individuals from three urban areas in Chile, also provides information concerning the socio-demographic and socio-economic characteristics of respondents. This enables us to determine the degree to which evaluations of income fairness vary according to subjective social position and objective position based on income and education.

In the first part of the article, we review the constituent elements of individuals' evaluations of the fairness of their income level, along with the influence of education-based merit on these judgments. In the second part, we present the research method, describing survey application, the procedure used to measure evaluations of distributive justice using vignettes, and the analysis of the data. We then present the results,

first in terms of the respondents' subjective evaluations of their incomes and the justifications they offer for education-based merit; and second in terms of how the two evaluations are distributed according to the various subjective social strata, in contrast to the influence of objective conditions such as income, education, and other relevant socio-demographic characteristics.

Belief in Fairness: The Principles Involved in Distributive Justice

Opinion surveys of distributive justice conducted in many countries around the world reveal that the majority of the population in Chile and Latin America as a whole evaluate the income distribution as unfair (García-Sánchez *et al.*, 2022; Moya *et al.*, 2023; Reyes & Gasparini, 2022). Liebig and Sauer (2016) define distributive justice as the allocation and distribution of goods such as income and wealth, and burdens such as taxes, based on socially established principles. In Chile, whose population considers the incomes of the lowest strata to be especially unfair, evaluations of unfairness are greater among individuals with lower levels of income and education (Castillo, 2011; Mac-Clure *et al.*, 2019).

As a principle of distributive justice, meritocracy is, theoretically, a component of the equality of opportunity and serves to "level the playing field" for individuals, leaving only the differences for which they themselves are responsible (Roemer, 1998). However, scholars have discussed the notion of meritocracy extensively in terms of its association with equality of opportunity, debating whether it pertains to effort or results and, more broadly, its links to neoliberalism (Evans & Kelley, 2022; Roemer, 1998).

Against the backdrop of this debate, in the present work, we focus on the notion of education-based merit rather than other forms of merit. Education has been a central component since the inception of the notion of meritocracy in social theory and contemporary society, as well as in neoliberal discourse and justifications of income inequality by the elite (Atria *et al.*, 2020; Littler, 2018). Within the discussion of distributive justice and meritocracy, equality of opportunity —defined as the principle according to which the position of individuals in society depends on their contribution to it and not on their position of origin— is, in real terms, a principle of justice that derives from individuals' membership of social groups and societies formed in the past (Sandel, 1982; Taylor, 1994). This is the basis of a central argument put forward

by the present work concerning the link between ideas of justice and social identities.

Data for many countries, including in Latin America, reveal that, in recent decades, evaluations of income inequality as unfair predominate despite widespread belief in merit as a justification for this inequality (Janmaat, 2013). It is those who perceive merit to be functioning correctly as part of income inequality who justify economic differences (Castillo *et al.*, 2019; Janmaat, 2013). The data also indicate a prevailing opinion that education, in particular, provides a justification for income inequality (Janmaat, 2013). Differences in income are legitimate when they exist between occupations that require little education, intermediate levels of education, and university-level education (Evans & Kelley, 2022).

However, evaluations are less favorable regarding the real-world functioning of merit in society. Although a considerable proportion of individuals from many countries see merit as justifying differences, they also perceive non-meritocratic factors that influence individual achievement (McCall *et al.*, 2017; Mijs & Hoy, 2021). These include family background, the nature of the economic model, and the education system. In several countries studied, including in Latin America, around half of individuals perceive that income and wealth are determined by a combination of meritocratic factors and barriers to merit (Bucca, 2016; Frei *et al.*, 2020; Espinoza *et al.*, 2023; Lepianka *et al.*, 2009).

On this subject, the studies mentioned have featured an under-current of discussion regarding the principles involved in distributive justice —in particular merit, equality, or the need for a minimum level of income in order to live— which can also be conceptualized as forms of equality (Fröhlich & Oppenheimer, 1990). In the present work we contribute to the debate with evidence concerning the extent to which evaluations of income injustice involve a critical judgment based solely on a meritocratic criterion, or whether such judgments take other principles into consideration.

Regarding the extent to which the meritocratic principle operates within distributive justice, we pose the question of whether those in a lower socio-economic position —in terms of both their income and occupation and their subjective self-identification— attribute their situation to non-meritocratic factors, while those in the highest socio-economic strata resort to the discourse of meritocracy (Frei *et al.*, 2020; Mijs, 2021). There is also discussion as to whether, falling between these two groups, members of the middle classes identify their own achievements in terms of a positive view

of the meritocratic mechanism, or whether they share the evaluation that their personal effort and educational level merit higher salaries (Barozet *et al.*, 2021; Libertad y Desarrollo, 2019). In a broader sense, we maintain that social position impacts the opinions held by individuals regarding distributive justice and merit.

The Experience of (Un)fairness: From Abstract Judgment to Situated Judgment

Rather than taking a general theory of justice or an abstract notion of what is fair, we base the argument developed in this section on the idea that injustice —and, in particular, the denial of what has been promised to us— is a direct and intense experience for individuals (Shklar, 2014). In the present study, we explore people's experiences of injustice in relation to their own incomes.

Several factors relating to their personal experience come together in the judgments that individuals form regarding their income level and the impact of meritocracy. These include the information to which they have access and their appreciation of the degree of income inequality that they experience, their perception of the treatment they receive within the occupational hierarchy, the gender- and race-based discrimination they face, their educational level, their family background and social mobility, their employment situation, and their aspirations and interests (Kluegel & Smith, 1986; Mijs & Hoy, 2021). Thus, in order to understand the process that individuals go through when justifying income inequality and, in particular, as they characterize it as unfair, we assume that they do so by referencing their own social position, which includes a combination of multiple inter-group distinctions.

This requires that we focus on the individual both as an observer and as a subject of analysis, rather than simply assigning them the role of passive informant who contributes opinions on distributive justice (Jasso *et al.*, 2016). We maintain that an individual's judgment of their income is situated within an experience that is, to some extent, shared with others who identify with a common social position.

This situated judgment results from a complex process of reflection. Researchers have studied notions of distributive justice expressed by individuals using empirical data concerning belief in principles such as meritocracy, perceptions of existing income inequalities, and normative

judgments as to whether incomes are fair or unfair (Janmaat, 2013; Jasso *et al.*, 2016). Furthermore, studies have found that individuals evaluate income inequality differently depending on which group they consider to be their point of reference and how they describe the differences between groups (Bruckmuller *et al.*, 2017). Evaluations are also influenced by a series of inequalities that affect individuals, rather than by income alone. These include their social capital; their place of residence; or their access to collective goods, private consumption, and public services (Lamont & Fournier, 1992; Mac-Clure *et al.*, 2019; Pénissat & Jayet, 2009). Our study addresses the complexity of the process by which individuals reflect on the fairness of their incomes, putting participants in a situation where they must judge multiple dimensions simultaneously, rather than one in particular.

With this focus, we assume that, in a neoliberal society, merit generates discrepancies between the life experiences of individuals and constitutes a sociological problem. On the one hand, the meritocratic principle is applied excessively to justify inequalities (Littler, 2018). On the other, it is a notion that is shared across society —albeit in terms of varied and indeterminate meanings— and constitutes an argument for the need to tackle barriers that reproduce social inequalities (Atria, 2021). In the present work, we suggest that analyzing the differences between social positions can provide a better understanding of these apparent inconsistencies. We are particularly interested in examining whether critical judgments are more intense within certain strata.

When asking individuals to evaluate distributive justice based on their own income, we consider that they may be reluctant to reveal their assessment, preferring instead to offer ideas adapted according to their socialization and to social desirability. Often, and especially when they have suffered discrimination or stigmatization, people in a lower socio-economic situation express only indirectly the emotional implications of being a victim of injustice (Lamont *et al.*, 2016; Skeggs, 1997). We therefore approach people indirectly in order to uncover their evaluative judgments, thus avoiding any predisposition to conceal certain aspects or to adapt discursive responses.

Finally, in order to establish whether an individual's subjective social position significantly influences their evaluation of the fairness of their income, we must examine whether such judgments are due to the relative influence of objective conditions of income and education, which the literature identifies as playing a relevant role (Choi, 2021).

Some argue that a lower income fosters a more marked perception of injustice based on individual merit (Castillo *et al.*, 2019; Mijs & Hoy, 2021). However, contrary to what one might expect, some authors argue that individuals with a higher level of education attribute inequality to structural rather than meritocratic factors, which could be due to the "illustration hypothesis" (Bucca, 2016; Kluegel & Smith, 1986).

As such, we must examine what determines an individual's evaluation of the fairness of their income. Similarly, it is important to control these estimates based on the respondent's socio-demographic characteristics such as sex and age. In addition, considering the significance of urban inequalities in Latin America, we must establish whether area of residence generates a territorial effect, regardless of the individual's other socio-economic characteristics (Sabatini *et al.*, 2001).

We hypothesize that the higher the individual's subjective position, the lower the level of injustice they judge to exist regarding their income; and that this relationship is even stronger when judgments rest on a notion of personal merit (Hypothesis 1). Second, we hypothesize that the higher the individual's income, the lower the level of injustice they judge to exist regarding that income; and that this relationship is even stronger when judgments rest on a notion of personal merit (Hypothesis 2). Third, we hypothesize that the higher the individual's educational level, the lower the level of injustice they judge to exist regarding their income; and that this relationship is even stronger when judgments rest on a notion of personal merit (Hypothesis 3). Finally, and notwithstanding the above, we hypothesize that the influence of an individual's subjective position on their evaluation of injustice is greater than that of the objective conditions of income and education, regarding both the level of their income and the application of the meritocratic principle (Hypothesis 4).

Method

Data

In 2021, we applied a face-to-face vignette-based survey to a statistically representative sample of the adult population (aged 18 years or older) of three urban areas of Chile. The urban areas addressed were the eastern zone of Santiago (consisting of the most affluent districts of the country's capital), the rest of Santiago (the remaining districts), and the intermediate

city of Puerto Montt in the south of the country. Our choice of these areas allows us to measure the incidence of urban segregation typical of Latin American metropolises and the impact of the socio-spatial particularities of intermediate cities in the national context (Mac-Clure *et al.*, 2014; Fuentes & Mac-Clure, 2020; Sabatini *et al.*, 2001). In each area, we conducted probabilistic sampling at the block, household, and individual levels, and we surveyed a sample of 1,620 individuals. We reduced the sample to 1,273 individuals who were able to provide valid data for all the variables of interest included in this article. We applied the survey between June and September 2021, amid the socio-political crisis triggered by the popular uprising of 2019 and the COVID-19 pandemic.

Variables

Independent Variable: Subjective Social Stratum

The subjective social stratum of respondents was established through a selection of vignettes describing characters representative of different social positions. In a study of subjective positions, vignettes are effective for the measurement of complex and multidimensional concepts that are best described using examples (Kapteyn *et al.*, 2009; King & Wand, 2007; Ravallion *et al.*, 2016). In addition, by providing realistic descriptions of third parties rather than asking direct questions, vignettes help respondents feel more comfortable expressing their ideas and feelings on sensitive topics such as the subjectivities studied in the present work (Finch, 1987).

Using vignettes enables access to subjective evaluations of justice that are typically difficult to obtain and helps to reduce biases often present in studies of distributive justice, such as pure individual self-interest that is dissociated from existing social conditions (Santamaría *et al.*, 2023). The vignettes present realistic descriptions of people based on multiple characteristics. However, our approach differs from that of other studies in which the descriptive dimensions of each vignette are modified to measure specific aspects relating to each of them (Auspurg & Thomas, 2015).

In particular, the vignettes presented to the respondents describe four fictitious characters who embody the classifications of members of Chilean society expressed during a previous survey applied to a

statistically representative sample of the Chilean population (Mac-Clure *et al.*, 2019; Mac-Clure *et al.*, 2022). These fictitious individuals correspond to the subjective definition of four social strata: lower, lower-middle, upper-middle, and the economic elite. Thus, the procedure involves a set of social positions with which individuals then express that they identify, and differs from approaches that attribute a subjective position, for example, by requesting that individuals identify themselves on a scale of social classes.

We established the respondents' subjective identification with the pre-defined strata in a sequence of two steps. During the first stage of the survey, we presented the four vignettes to the respondents, telling them that they "represent different people within Chilean society." We provided descriptions of each character based on multiple socio-economic dimensions, such as occupation, educational level, and income. Each description is highly realistic and is based on the previous survey and focus groups, which revealed categories (such as income ranges) and vignettes (the four indicated) that summarize the (subjective) socio-economic classifications elaborated by the individuals themselves.

As an illustration, the text for the vignette corresponding to the lower-middle stratum reads:

> Valeria Carrasco works as a secretary at a paper factory. She is 34 years old, she is separated, and she has one child. She completed her studies at a technical institute, specializing in risk prevention, but was unable to find work in that field. She lives in an apartment on Avenida El Parrón in Lo Espejo district, part of the Santiago Metropolitan Region. In her work as a secretary, she earns a monthly salary of CLP 480,000 after tax (US$ 492). People she knows have lost their jobs, but the paper produced by the factory remains in demand and she has kept her job as a secretary.

In the second stage of the survey, we asked the respondent to indicate which of the four people they most identified with. This was an indirect procedure to establish self-identification with a social stratum. The procedure is based on the assumption that the respondent considers multiple characteristics of the person represented in the vignette, establishing their own hierarchy of the most relevant aspects. In the questionnaire, we asked the respondents not to consider the sex of the person represented in the vignette in order to rule out gender biases ex-ante. Only 0.6% of the original sample of respondents identified themselves as similar to the vignette representing the economic elite, so we excluded this group from the data analysis. Thus, our operational

definition of subjective social position is based on self-identification with one of the social strata represented in the vignettes, which constitute an ordinal variable of three categories: lower, lower-middle, and upper-middle.

Dependent variables: Evaluation of income as unfair and evaluation of income as unfair according to merit.

Once the respondent had identified with one of the three characters, the next step was to direct their attention to a particular piece of information included in the vignettes: the income received by the characters represented. To examine the subjective evaluation of the fairness of income received, we distinguished two aspects that constitute the dependent variables of this study: the perceived unfairness of the income according to the amount received and according to the meritocratic criterion.

The value of the first dependent variable —the subjective evaluation of the fairness of the income amount— was determined using the following question: "*NN* (each of the vignettes) *has an income of...* (income amount in the respective vignette). *Relative to the income that NN earns, do you think they should earn less or more?*" Respondents answered on an ordinal scale of five alternatives, similar to a Likert scale, ranging from 1 ("much less") to 5 ("much more"). This response involves making a value judgment by comparing the income of the character described in each vignette with the income level of other social strata represented by the other vignettes. In addition, when subjectively evaluating the fairness of the income received, the various characteristics of the individuals presented in the vignettes require the respondent to make a multidimensional judgment.

Subsequently, when analyzing the data, we consider only the response to the vignette with which each respondent identifies, assuming that their judgment refers indirectly to them. In this way, we avoid conducting a more straightforward opinion poll on distributive justice in society. Thus, we analyzed the subjective evaluation of the fairness of the income amount received based on the self-identification of respondents, within the framework of a comparison with the other characters described in the vignettes and in combination with multiple dimensions, all in order to indirectly measure their subjective judgment of income distribution.

Regarding the dependent variable of the subjective evaluation of income fairness according to merit, we focused on the assessment of education, which we consider a key indicator of meritocratic legitimacy. For this, we used the respondent's answer to the following question: "*NN* (each of the vignettes) *studied...* (educational level in the respective vignette). *Is NN's income fair given the effort they put into their education?*" Respondents answered on an ordinal scale of five alternatives ranging from 1 ("very fair") to 5 ("very unfair"). As with our analysis of the first dependent variable, the evaluation of education as a meritocratic criterion refers to income received to measure the respondent's judgment of income distribution.

According to the above, we measured indirectly the individual's evaluation of their income as (un)fair through the vignette to which they consider they bear the greatest resemblance. This indirect procedure follows the sequence of steps presented in Figure 1.

This method has novel features, but also certain limitations. To measure subjective evaluations of income distribution, rather than asking individuals directly for their opinion, we guide their judgment toward characters represented in vignettes. This indirect procedure has the added advantage of providing a single scale for all respondents. Although the results obtained allow for broad generalizations, performing comparative analyses with other data remains challenging.

Analysis Strategy

The analysis strategy consists of two phases. We begin by describing the two dependent variables: individuals' subjective evaluation of the fairness of the amount of income received, and individuals' subjective evaluation of the fairness of that income according to their educational level, which is understood as the effective functioning of meritocracy. We present the distributions of the two evaluations made by individuals belonging to each subjective social stratum.

We then estimate linear regression models to test the four hypotheses defined earlier. We estimate a first group of models with evaluations of income as "unfair" as the dependent variable (models M1 to M4), and a second group of models with evaluations of income as "unfair according to merit" as the dependent variable (models M5 to M8). The structure is the same in both groups of models: one model with subjective social stratum as the independent variable (models M1 and M5), one with

income (models M2 and M6), and one with education (models M3 and M7). We estimate a final model involving the three variables simultaneously (models M4 and M8) in order to understand which of them prevails over the rest within the configuration of respondents' evaluations of unfairness.

We included two measures of respondents' objective social positions: income and education. Income is a categorical variable of five groups (the autonomous per capita household income quintiles), taking as reference the 2017 National Socio-Economic Characterization Survey (CASEN) (Ministerio de Desarrollo Social y Familia, 2018), which is the main instrument used to measure income distribution in Chile. We chose a categorical rather than a non-linear or logarithmic income variable because, given Chile's marked income concentration and inequality, along with the significant gap between the upper social sectors and the rest of the population, it is advisable to estimate the differences between different income groups, rather than a single coefficient. The education variable has four categories and refers to the highest educational level achieved by the respondent: primary, secondary, tertiary technical, and tertiary university.

Likewise, the models incorporate controls according to relevant socio-demographic variables: sex (male, female), age (18-29 years, 30-44 years, 45-54 years, 55-64 years, 65 years or older), area of residence (non-eastern Santiago, eastern Santiago, Puerto Montt), and occupational category (employer or self-employed, paid worker, unemployed, outside the formal workforce). We present a description of the sample composition in Table 1, detailing the distribution of the variables.

In all analyses, we applied a post-survey weighting to correct the results according to census data.

Unfair Income and Subjective Social Position

The data obtained confirm that respondents evaluate the income of their social stratum as unfair. Of the total sample, 26.4% believe that the income earned by the vignette with whom they identify should be "much more," while 64.8% believe that it should be "more." Only 8.1% say that what they earn is the "right amount," and those who consider that their income should be "less" or "much less" account for less than 1% each. In other words, 91.2% of respondents identify some degree of injustice in their evaluation of the income earned by their

subjective social stratum, as represented by the vignette with which they identify. This considerable proportion is similar to that observed in other surveys that ask whether the income gap in Chile is too large (ELSOC survey 2014) or how fair or unfair the country's income distribution is (ISSP survey) (González *et al.*, 2017; Moya *et al.*, 2023). However, although an evaluation of unfairness predominates across all respondents this judgment differs markedly according to their subjective social stratum, as shown in Figure 2.

As expected, evaluations of income injustice predominate among respondents from the lowest social stratum, who almost unanimously state that the vignette representing them should earn "much more" (48.8%) or "more" (50.2%). Respondents from the lower-middle stratum share this sentiment, although the proportion who feel they should earn "much more" is markedly lower (18.2%).

By contrast, among respondents from the upper-middle stratum, the judgment that they should earn "much more" is far less prominent (9% of evaluations), while those who believe that they earn the "right amount" account for 24.5% of evaluations. Although the view that income should be higher predominates across all strata, we observe that the higher the subjective social position of the respondents, the lower the proportion of those who evaluate their income level as unfair. This is not a gradual difference; it is particularly accentuated between the lower and lower-middle strata.

The fact that respondents who self-identify with any of the three strata predominantly evaluate income injustice makes it particularly important for us to observe the extent to which this judgment is reproduced when evaluating the application of the meritocratic principle, based on education. When asked whether the earnings of their stratum are fair considering their effort to educate themselves, 14.6% say it is "very unfair," a majority of 64.4% say it is "unfair," and 5.4% evaluate it as "neither fair nor unfair." By contrast, 14.8% of respondents consider this amount to be "fair" and 0.8% consider it to be "very fair."

Thus, although a majority notion of injustice still prevails, we observe that including individual merit in the evaluation of income yields a reduction in reported levels of unfairness: the 91.2% of respondents who believe that they should earn "much more" or "more" drops to 79% who consider the income to be "very unfair" or "unfair" considering the effort made to gain education. However, again, and as

one might expect, there are considerable differences according to the subjective social stratum of the vignette with which respondents identify.

As shown in Figure 3, the vast majority (93%) of respondents who self-identify with the lower stratum judge their income to be "very unfair" or "unfair" based on their educational level as an indicator of meritocracy. This evaluation of injustice in relation to educational level also predominates in the lower-middle stratum, but to a lesser extent (85.4%). This indicates that, among respondents from the lower stratum, rejection of the idea that their low income is justified by their lower educational level is particularly pronounced, which raises the question of whether their evaluation of income injustice is based on criteria other than education-based meritocracy.

However, the most pronounced differences emerge between those who identify with the lower and lower-middle strata and those who consider themselves part of the upper-middle stratum. Specifically, among respondents who subjectively identify with the upper-middle social stratum, only 1.1% view the relationship between income and educational effort as "very unfair," while 43.3% consider it "unfair," together accounting for 44.4% of evaluations. In contrast, a significant 42.6% of these respondents perceive their incomes as "fair" based on education, representing a notable increase compared to judgments made without considering education. Conversely, the increase in perceptions of fairness is less pronounced among those identifying with the lower and lower-middle strata.

Thus, we observe two major trends. First, evaluations of income injustice predominate across all subjective social strata, but they are more pronounced in the lower and lower-middle strata than in the upper-middle stratum. This pattern is evident both when individuals make general judgments about their income and when they consider merit based on the effort they have invested in their education. Second, while all subjective social strata exhibit a decrease in reported injustice when merit is taken into account, the most significant reductions occur among those who identify as belonging to the upper-middle stratum. Within this segment, education-based merit plays a more relevant role in the evaluation of one's own income.

Factors Influencing the Subjective Evaluation of Income Justice

In this section, we analyze the descriptive trends observed, testing our hypotheses using linear regression models, with evaluations of income injustice and evaluations of income injustice according to merit as dependent variables. These estimates consider the subjective social stratum, income, and educational level of respondents, controlling according to relevant socio-demographic factors: sex, age, area of residence, and occupational category.

To facilitate the interpretation of the models, we present graphs of predicted values for both variables of interest, with 95% confidence intervals. We adjusted these values based on the following categories: male (sex), 18 to 29 years (age), non-eastern Santiago (area of residence), and employer or self-employed (occupational category). We reported all regression model coefficients at the end of the document.

Evaluation of income unfairness

Figure 4 shows the values predicted by the regression models in terms of subjective evaluations of income unfairness, considering the three variables mentioned above.

The predicted values of evaluations of income unfairness reveal, first, that the higher the subjective social stratum of the respondents, the lower the level of injustice they identify in their evaluations, once controlled according to socio-demographic factors. The regression models confirm the differences between the lower, lower-middle, and upper-middle strata seen in the previous section and are statistically significant with a 95% confidence level. Second, and in contrast to our findings based on subjective strata, there are no significant differences between the income quintiles, suggesting that the mere economic situation of respondents is not a determining factor in their judgments of their income. Third, with regard to education, we find a similar trend to that of subjective stratum, where the higher the individual's educational level, the lower the level of injustice they identify when making evaluations. However, we only identify statistically significant differences in judgments between the lowest and highest educational categories: primary and university.

Evaluation of income unfairness according to merit

Figure 5 presents the predicted values for evaluations of income unfairness according to education-based merit, considering the respondents' efforts to educate themselves. As specified above, and as with the other two variables, educational level refers to that of the respondents and not to that indicated in the vignettes.

As with income level, we begin by observing the influence of subjective social stratum on the degree of unfairness that respondents identify when evaluating their income according to educational merit. The higher the subjective position of the individual, the lower the level of injustice they identify when evaluating income based on the merit of their education. However, in contrast to evaluations of income regardless of educational effort, the study does not identify any statistically significant differences between the lower and lower-middle strata. These two subjective strata differ only from the upper-middle stratum, whose evaluation of merit-based injustice is significantly lower. Second, we observe that, as with the perceived unfairness of their level of income, the income quintile of respondents is not a relevant factor in judgments that take the meritocratic principle into account. Likewise, we observed no statistically significant differences according to respondents' educational level.

Summary

Based on the above, we can confirm Hypothesis 1: the higher the subjective social position of the individuals surveyed, the lower the level of unfairness they judge to exist regarding their income. This relationship is even more pronounced when judgments of income level rest on a notion of personal merit, where the differences between the lower and lower-middle strata are no longer significant, but the gap between them and the upper-middle group is even greater. However, we find no empirical support for Hypothesis 2: respondents' income is not a key determinant of the degree of injustice that they judge to exist regarding the income of their stratum. Regarding the role of respondents' educational level, we can only partially confirm Hypothesis 3: it triggers differences in evaluations of income level for the stratum with which respondents identify, but not in the application of the meritocratic principle based on effort to educate themselves.

We report the calculated regression models in Tables 2 and 3, including those that cover subjective social stratum, income, and education simultaneously (models M4 and M8, respectively). In both the model estimated for evaluations of income unfairness and that for evaluations of income unfairness according to merit, when all variables are added, the effect of the subjective social stratum remains constant with respect to previous models. By contrast, the significance of income and education falls to the extent that the direction of the previously observed effect changes. This persistence of significant and stronger effects of respondents' subjective social stratum over income or education shows that the former has a greater effect on evaluations of income injustice and corroborates Hypothesis 4.

Conclusion

Based on this indirect method, our survey results reveal that people tend to form evaluations of distributive injustice regarding their own situations. More specifically, respondents overwhelmingly evaluate their incomes as unfair. However, this evaluation of injustice is heterogeneous, manifesting itself differently according to the social position with which respondents identify: the lower the subjective social stratum of the individual, the greater the level of unfairness they identify when evaluating their income. This confirms the sociological relevance of the self-identification of social position by individuals themselves (Boltanski & Thévenot, 1983).

The predominance of evaluations of income levels as unfair contrasts with the findings of a survey based on a similar method that we applied in 2016, in which judgments of income were proportionally less critical (Mac-Clure *et al.*, 2019). This change is a sign that individuals' representations of income injustice fluctuate and grow in times of crisis such as that triggered by Chile's popular uprising of 2019, when we applied the survey analyzed in the present article.

In the present work, we approach merit as a sociological problem that is the subject of debate. Perceptions of injustice diminish when respondents consider education-based merit when evaluating the fairness of the income received by the character in the vignette with which they identify. However, their evaluation of injustice remains much higher than when merit is not included. The question of

whether education-based meritocracy influences income level indicates that some people consider the principle of merit to be less relevant than others. Equally, it may also be because some individuals believe that meritocracy should be an influential factor, even though in practice this is not the case.

Moreover, the legitimacy of education-based merit has majority approval within the upper-middle stratum, but a higher proportion of respondents from the lower-middle stratum and even from the lower stratum evaluate their income as unfair considering their education, taking as reference the vignette with which they identify. Contrasting markedly with these two subjective social positions, evaluations of the fairness of their income are strong within the upper-middle stratum when merit is considered. This confirms that meritocracy is not the exclusive principle within the question of distributive justice. Furthermore, it highlights the debate concerning the other criteria that individuals apply when asserting the unfairness of their incomes, especially in the lower-middle and lower social strata, as we have outlined in the present paper (Fröhlich & Oppenheimer, 1990; Mijs & Hoy, 2021).

In short, we observe a decisive influence of social self-identification on the degree to which the individuals surveyed evaluate their income as unfair and how this evaluation relates to education-based merit. In contrast, their objective socio-economic positions based on income and education do not significantly impact their evaluations.

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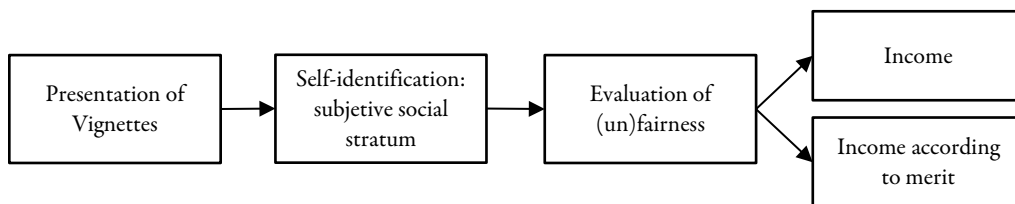
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Annex

Figure 1

Methodological sequence for the measurement of subjective evaluations of the (un)fairness of individual income

Source: Compiled by the authors, 2021 Survey.

Figure 2

Evaluation of income unfairness, by subjective social stratum
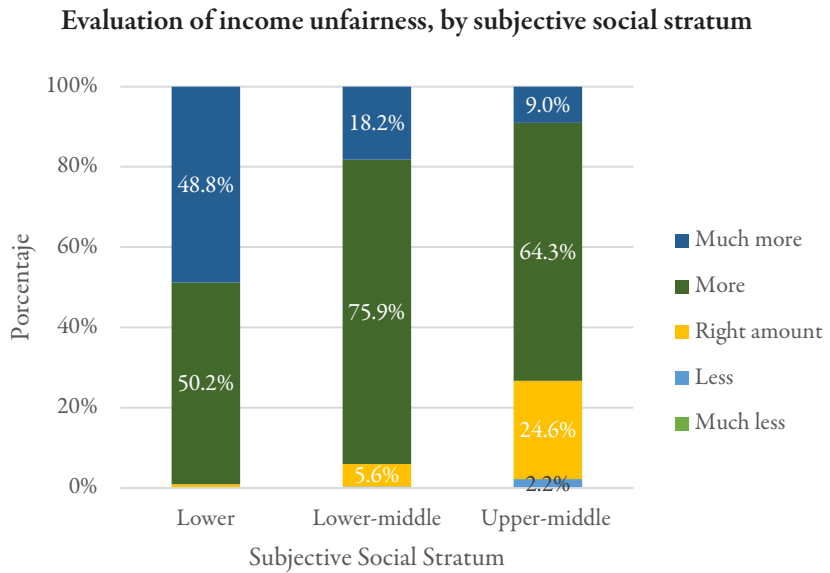
Note: Original question: "NN (the vignette / stratum with which the individual identifies) has an income of... Regarding the income earned by NN [the vignette / stratum with which the individual identifies], do you think that they should earn less or more?" Data labels are omitted for categories with fewer than 2% responses.
Source: Compiled by the authors, 2021 Survey.

Figure 3

Evaluation of income unfairness according to merit, by subjective social stratum
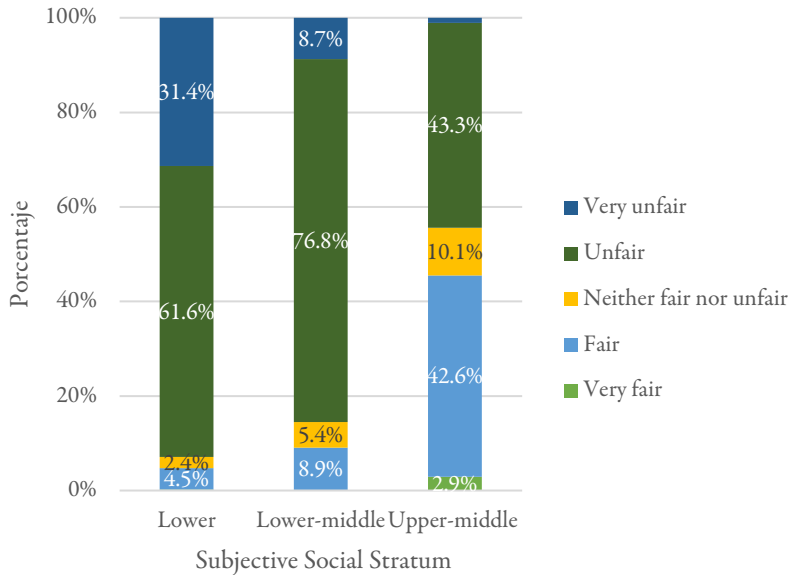
Notes: Original question: "NN (the vignette / stratum with which the individual identifies) studied... Do you think that what NN [the vignette / stratum with which the individual identifies] earns is fair given the effort they have made to educate themselves?" Data labels are omitted for categories with fewer than 2% responses.
Source: Compiled by the authors, 2021 Survey.

Figure 4

Predicted values of evaluation of income unfairness, by subjective social stratum, income, and education, controlling by socio-demographic factors
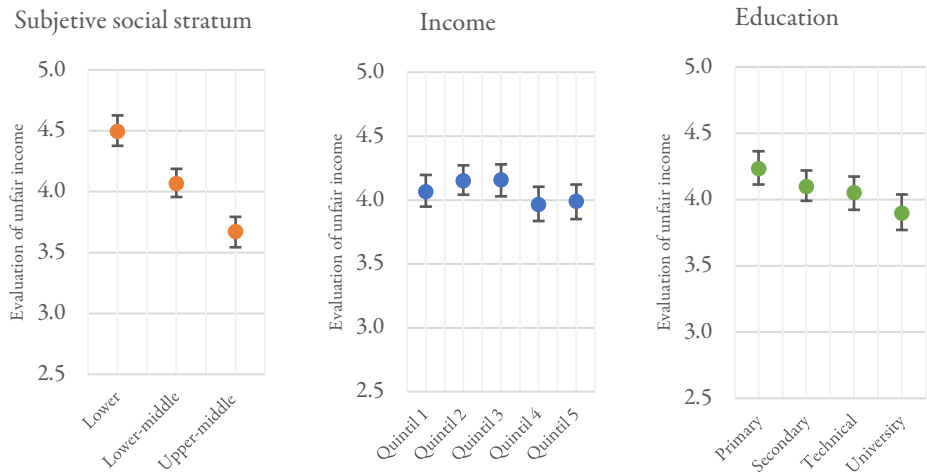
Source: Compiled by the authors, 2021 Survey. Predicted values estimated based on models M1, M2, and M3, respectively.
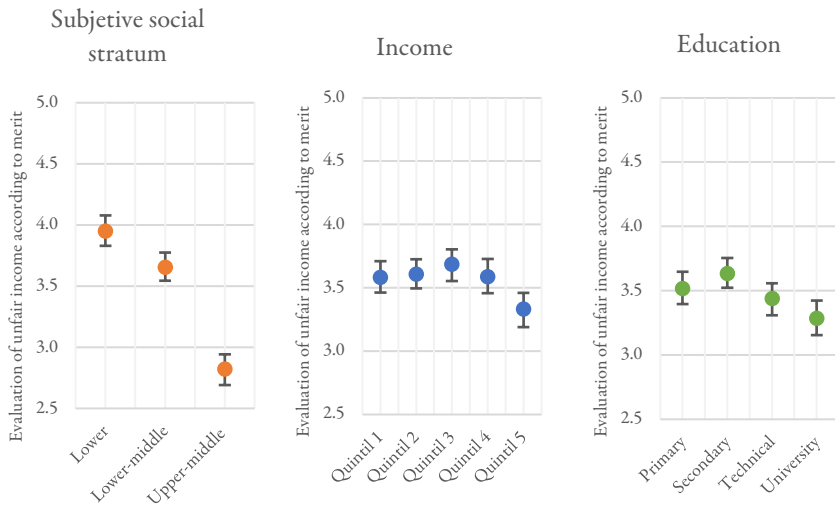
Figure 5

Predicted values of evaluation of income unfairness according to merit, by subjective social stratum, income, and education, controlling by socio-demographic factors

Source: Compiled by the authors, 2021 Survey. Predicted values estimated based on models M5, M6, and M7, respectively.

Table 1

Distribution of variables

Variable	Values	Frequencies (%)	n
Evaluation of unfair income	Much less	2 (0.2%)	1273
	Less	7 (0.5%)	
	Right amount	103 (8.1%)	
	More	825 (64.8%)	
	Much more	336 (26.4%)	
Evaluation of unfair income according to merit	Very fair	10 (0.8%)	1273
	Fair	188 (14.8%)	
	Neither fair nor unfair	69 (5.4%)	
	Unfair	820 (64.4%)	
	Very unfair	186 (14.6%)	
Subjective social stratum	Lower	424 (33.3%)	1273
	Lower-middle	572 (44.9%)	
	Upper-middle	277 (21.8%)	
	Higher	0 (0.0%)	
Income	Quintile 1	213 (16.7%)	1273
	Quintile 2	289 (22.7%)	
	Quintile 3	267 (21.0%)	
	Quintile 4	219 (17.2%)	
	Quintile 5	285 (22.4%)	
Education	Primary	281 (22.1%)	1273
	Secondary	501 (39.4%)	
	Technical	206 (16.2%)	
	University	285 (22.4%)	
Sex	Male	473 (37.2%)	1273
	Female	800 (62.8%)	
Age	18-29 years	226 (17.8%)	1273
	30-44 years	366 (28.8%)	
	45-54 years	214 (16.8%)	

	55-64 years	229 (18.0%)	
	65+ years	238 (18.7%)	
Area of residence	Non-eastern Santiago	467 (36.7%)	1273
	Eastern Santiago	420 (33.0%)	
	Puerto Montt	386 (30.3%)	
Occupational category	Employer or self-employed	307 (24.1%)	1273
	Paid worker	462 (36.3%)	
	Unemployed	136 (10.7%)	
	Outside the formal workforce	368 (28.9%)	

Note: Unweighted data.
Source: Compiled by the authors, 2021 Survey.

Table 2

Linear regression models for evaluation of income unfairness

		M1	M2	M3	M4
Subjective social stratum	Lower-middle	-0.43 ***			-0.47 ***
		(-0.50 – -0.36)			(-0.54 – -0.39)
	Upper-middle	-0.82 ***			-0.88 ***
		(-0.93 – -0.72)			(-0.99 – -0.76)
Income	Quintile 2		0.08 *		0.10 **
			(-0.01 – 0.18)		(0.01 – 0.19)
	Quintile 3		0.09 *		0.20 ***
			(-0.01 – 0.20)		(0.10 – 0.30)
	Quintile 4		-0.10 *		0.09
			(-0.22 – 0.02)		(-0.02 – 0.21)
	Quintile 5		-0.08		0.22 ***
			(-0.20 – 0.05)		(0.10 – 0.35)
Education	Secondary			-0.14 ***	0.01
				(-0.22 – -0.05)	(-0.07 – 0.09)
	Technical			-0.18 ***	0.09
				(-0.31 – -0.05)	(-0.04 – 0.21)
	University			-0.34 ***	-0.01
				(-0.45 – -0.22)	(-0.13 – 0.11)
Sex	Female	0.06 *	0.16 ***	0.17 ***	0.07 **
		(-0.00 – 0.13)	(0.09 – 0.23)	(0.10 – 0.24)	(0.01 – 0.14)
Age	30-44 years	0.01	0.04	0.02	0
		(-0.08 – 0.10)	(-0.06 – 0.13)	(-0.08 – 0.12)	(-0.09 – 0.09)
	45-54 years	0.12 **	0.16 ***	0.11 **	0.12 **
		(0.03 – 0.22)	(0.05 – 0.27)	(0.00 – 0.22)	(0.02 – 0.22)
	55-64 years	0.12 **	0.21 ***	0.15 **	0.12 **
		(0.02 – 0.22)	(0.10 – 0.32)	(0.03 – 0.26)	(0.02 – 0.23)
	65+ years	0.04	0.12 **	0.05	0.03
		(-0.07 – 0.15)	(0.01 – 0.24)	(-0.07 – 0.17)	(-0.08 – 0.14)

		M1	M2	M3	M4
Area of residence	Eastern Santiago	0.02	-0.15 ***	-0.08	0
		(-0.08 – 0.11)	(-0.26 – -0.04)	(-0.19 – 0.03)	(-0.10 – 0.10)
	Puerto Montt	-0.04	-0.07	-0.08	-0.04
		(-0.21 – 0.13)	(-0.25 – 0.12)	(-0.26 – 0.10)	(-0.21 – 0.13)
Occupational category	Paid worker	-0.01	-0.02	-0.02	-0.01
		(-0.09 – 0.08)	(-0.12 – 0.07)	(-0.12 – 0.07)	(-0.10 – 0.08)
	Unemployed	-0.12 **	0	0	-0.09
		(-0.23 – -0.01)	(-0.13 – 0.12)	(-0.12 – 0.12)	(-0.20 – 0.02)
	Outside the formal workforce	-0.10 **	-0.04	-0.04	-0.09 *
		(-0.21 – -0.00)	(-0.15 – 0.08)	(-0.15 – 0.07)	(-0.19 – 0.02)
(Intercept)		4.50 ***	4.07 ***	4.23 ***	4.38 ***
		(4.38 – 4.61)	(3.94 – 4.20)	(4.10 – 4.36)	(4.24 – 4.52)
Observations		1273	1273	1273	1273
Adjusted R^2 / R^2		0.220 / 0.212	0.061 / 0.051	0.072 / 0.062	0.234 / 0.223
AIC		3201.283	3440.701	3424.256	3190.894

Notes: Reference categories: Low (Subjective social stratum), Quintile 1 (Income), Primary (Education), Male (Sex), 18-29 years (Age), Non-eastern Santiago (Area of residence), Employer or self-employed (Occupational category).
* $p<0.1$ ** $p<0.05$ *** $p<0.01$.
Source: Compiled by the authors, 2021 Survey.

Table 3

Linear regression models for evaluation of income unfairness according to merit

		M5	M6	M7	M8
Subjective social stratum	Lower-middle	-0.29 ***			-0.40 ***
		(-0.39 – -0.19)			(-0.51 – -0.29)
	Upper-middle	-1.13 ***			-1.24 ***
		(-1.27 – -0.98)			(-1.40 – -1.08)
Income	Quintile 2		0.03		0.04
			(-0.11 – 0.16)		(-0.09 – 0.16)
	Quintile 3		0.1		0.16 **
			(-0.04 – 0.25)		(0.02 – 0.30)
	Quintile 4		0.01		0.18 **
			(-0.16 – 0.17)		(0.02 – 0.34)
	Quintile 5		-0.25 ***		0.16 *
			(-0.42 – -0.08)		(-0.01 – 0.33)
Education	Secondary			0.12 *	0.25 ***
				(-0.00 – 0.24)	(0.14 – 0.36)
	Technical			-0.08	0.20 **
				(-0.26 – 0.10)	(0.03 – 0.38)
	University			-0.23 ***	0.18 **
				(-0.40 – -0.07)	(0.01 – 0.35)
Sex	Female	0.10 **	0.19 ***	0.21 ***	0.10 **
		(0.01 – 0.19)	(0.09 – 0.28)	(0.11 – 0.30)	(0.01 – 0.19)
Age	30-44 years	0.09	0.11	0.15 **	0.11 *
		(-0.04 – 0.21)	(-0.03 – 0.25)	(0.01 – 0.29)	(-0.02 – 0.24)
	45-54 years	0.1	0.13 *	0.14 *	0.15 **
		(-0.04 – 0.24)	(-0.02 – 0.28)	(-0.01 – 0.29)	(0.01 – 0.29)
	55-64 years	0.15 **	0.23 ***	0.26 ***	0.22 ***
		(0.01 – 0.29)	(0.07 – 0.38)	(0.10 – 0.41)	(0.07 – 0.36)
	65+ years	0.14 *	0.20 **	0.25 ***	0.23 ***
		(-0.01 – 0.29)	(0.04 – 0.36)	(0.08 – 0.42)	(0.07 – 0.38)

		M5	M6	M7	M8
Area of residence	Eastern Santiago	0.05	-0.17 **	-0.14 *	0.01
		(-0.09 – 0.19)	(-0.32 – -0.02)	(-0.30 – 0.01)	(-0.13 – 0.16)
	Puerto Montt	0.08	0.02	0.02	0.09
		(-0.16 – 0.31)	(-0.23 – 0.28)	(-0.24 – 0.27)	(-0.15 – 0.32)
Occupational category	Paid worker	-0.03	-0.03	-0.02	-0.02
		(-0.15 – 0.10)	(-0.16 – 0.10)	(-0.16 – 0.11)	(-0.14 – 0.10)
	Unemployed	0	0.13	0.16 *	0.05
		(-0.16 – 0.15)	(-0.04 – 0.31)	(-0.01 – 0.32)	(-0.11 – 0.21)
	Outside the formal workforce	0.03	0.09	0.12	0.07
		(-0.11 – 0.17)	(-0.06 – 0.25)	(-0.04 – 0.27)	(-0.07 – 0.21)
(Intercept)		3.95 ***	3.58 ***	3.52 ***	3.71 ***
		(3.79 – 4.11)	(3.40 – 3.76)	(3.34 – 3.70)	(3.52 – 3.90)
Observations		1273	1273	1273	1273
Adjusted R^2 / R^2		0.199 / 0.191	0.062 / 0.052	0.065 / 0.056	0.217 / 0.205
AIC		4062.667	4266.738	4260.695	4047.141

Notes: Reference categories: Low (Subjective social stratum), Quintile 1 (Income), Primary (Education), Male (Sex), 18-29 years (Age), Non-eastern Santiago (Area of residence), Employer or self-employed (Occupational category).
* $p<0.1$ ** $p<0.05$ *** $p<0.01$.
Source: Compiled by the authors, 2021 Survey.

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