

## Social Comparisons in Migration and Inequality Studies: A Literature Review and Evidence from a Pilot Study

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## Social Comparisons in Migration and Inequality Studies: A Literature Review and Evidence from a Pilot Study

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## Abstract

Theories and research in the area of social comparisons assume that the tendency toward such comparisons is universal. When investigating what people tend to focus on when making comparisons, many scholars have dealt with questions such as: with whom; under what circumstances; and in which realms? But one question has remained almost unexplored: what role does the migration experience play in social comparisons? In this paper, we draw attention to this important research topic. Qualitative analysis showed that migrants' transnational comparisons were relevant to perceived inequalities. Here, we present some quantitative evidence concerning migrants' social comparisons based on the pilot study, which involved 200 first- and second-generation Turkish migrants in Germany. The findings indicate that the migration experience and transnational comparisons are important to some of these migrants, such as those who view the emotional experience (e.g., the extent of social support, respect, and recognition) as being better in Turkey. Data from this pilot study also provide insights into the possible challenges of sociological social comparison studies, which we discuss in this paper.

“Here [in Germany] life can be very monotonous, very ordinary [...] consisting only of work, meaning the social life here is obviously very mediocre. But in Turkey it is not like that. [...] Yes, perhaps economically much more is guaranteed here [in Germany] and also welfare is much better but, on the other hand, to live with joy, why wouldn't I? To see the sun, to see my family. Staying connected with them all the time is all I can do for now.” (Berna, age 44, Germany)<sup>1</sup>

## Introduction

This quotation reveals some of the aspects and situations migrants typically refer to when making transnational social comparisons. In this interview, Berna, who migrated from Turkey to Germany, describes the inequalities she perceives in terms of the opportunities offered by each of the two countries. Her self-chosen references are on the level of the nation state (i.e., its welfare system and economy), as well as on a more personal level with respect to family and quality of life (e.g., the weather). This mixed response reflects the different evaluations and standards of comparison that arose through migration and knowledge about life standards in both countries (for detailed information about “transnational spaces of comparison,” see Sienkiewicz, Sadovskaya, and Amelina 2015). This paper is intended to contribute to the discussion of the nexus between social comparisons and social inequality in the context of cross-border migration.

One well-known option for improving one's life chances is spatial mobility. Moving from one place to another, such as from a village to a city (or vice versa), or to a more prosperous region or another country, can help one overcome regional or national inequalities. Important factors that drive a person's decision to migrate are the (social) comparisons and evaluations of past, present, and future life chances. At the same time, through (inter-)national migration, people become acquainted with new life conditions, ideas, and standards of evaluation that may affect their own perceptions. This revised outlook makes these migrants a particularly interesting group for social comparison studies. As long ago as the early 1980s, William H. Panning drew attention to the national and transnational relevance of social comparisons, by mentioning the crucial role of “those political, cultural, geographic, and institutional processes that encourage or inhibit social comparisons among the members of that society” (Panning 1983:329). Similar to Runciman's work on relative deprivation and social justice (1966), this focus is necessary in order to understand the processes of such deprivation within a society.

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<sup>1</sup> This passage has been taken from the article by Bilecen, Çatir, and Orhon (2015).

In his early theoretical and model-based work, Panning also asked an important question about the role of national and international communication for social comparisons and its impact on relative deprivation. This phenomenon is also touched on in the migration studies that became prominent in the early 1990s, thanks to Glick Schiller, Basch, and Blanc-Szanton (1992) and what has since been known as the transnational turn.

More than 30 years after Panning's work, there still is very little empirical research addressing social comparisons in migration processes. More recently, scholars such as Faist *et al.* (2015) and Lindemann and Saar (2014) have looked into the role that transnational social comparisons play in social inequalities. Our intention is to revisit this area of study and, in doing so, to summarize the current state of empirical research and to suggest possible directions for further study. We have analyzed the social comparisons voiced by migrants from Turkey in Germany based on data from a pilot study conducted as part of the project "Transnationality and Inequality: Pilot Project for the Panel Study," which has been conducted by the Collaborative Research Center 882 "From Heterogeneities to Inequalities" at Bielefeld University (2011–2015)<sup>2</sup>.

As a way to rekindle the discussion concerning the role of social comparisons in social mobility and inequalities, we have given special attention to comparisons made by migrants in relation to transnationality, by which we mean different dimensions and degrees of connection to the migrants' countries of origin (on questions of operationalization, see e.g. Fauser *et al.* 2015). This view can affect social comparisons made within what might be described as a dual-reference frame (Suárez-Orozco and Suárez-Orozco 1995). Through international migration, those migrants who develop and maintain transnational ties may have different and paradoxical social positions in different geographical locations (Nieswand 2011), and these positions can influence their choice of references when making social comparisons.

To contribute to the discussion about social comparison and transnationality, we will first review the most recent social psychological and sociological literature on social comparisons, with a particular focus on studies of the nexus between migration/transnationality and social comparisons. We then analyze empirical data from the pilot study that concern social and other comparisons reported by these migrants from Turkey in Germany. Based on the theoretical assumptions and the data collected, we focus on three main questions: (a) who makes

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<sup>2</sup> Qualitative findings which showed the relevance of social comparisons for social inequalities in life chances and social protection were carried out in another project called "Transnationality, and the Unequal Distribution of Informal Social Protection" also involved in the Collaborative Research Centre 882 at Bielefeld University. For detailed information about both project, supervised by prof. Thomas Faist, visit <https://sf882.uni-bielefeld.de/en/projects/c1> respectively <https://sf882.uni-bielefeld.de/en/projects/c3>.

these comparisons; (b) with whom do migrants from Turkey compare themselves, if they make comparisons at all; and (c) in which realms do migrants from Turkey make comparisons? Based on a review of the literature and our own empirical analysis, we conclude with recommendations and potential approaches to the study of social comparisons as they relate to (perceived) social inequalities in transnational social spaces.

## 1 SOCIAL COMPARISON THEORY IN SOCIAL PSYCHOLOGY AND SOCIOLOGY

Social comparisons play an important role in social psychology and are prominent in the work of Leon Festinger (1954), whose theory of social comparison processes has found extensive application in social psychology. In the next section, we present a general overview of this theory, with special attention given to additional literature on the concept of well-being, which overlaps with research in sociology. We also discuss the relevance of social comparisons to sociology in general, with a focus on sociological studies of migration and transnationality.

### 1.1 Social Psychology: Festinger and Tajfel

Social comparison theory gained relevance through the work of Leon Festinger (1954), who developed several key assumptions. For one thing, Festinger stated that people have a need to gain knowledge about themselves, which leads them to compare the “I” with an “Other.” Festinger’s ideas of social comparisons also influenced his theory of cognitive dissonance, in which the process of comparing oneself with similar people, groups, or standards may be seen as a strategy for reducing cognitive dissonance. For instance, he realized that people talk to others who presumably have similar opinions and ways of evaluating similar situations (see Festinger 1957). Festinger found that people like to use a variety of objective standards when evaluating the self, including their abilities, achievements, and general characteristics. The lack of objective measurements and criteria in many realms leads to more subjective and individual social comparisons with respect to others. One of Festinger’s hypotheses is that people choose similar Others when making social comparisons, because similar standards are necessary for such self-positioning to be valid. This idea has been critically discussed by many scholars who claim that various standards are applied when one is selecting the relevant Other, such as self-enhancement and self-improvement (for more details, see Corcoran, Crusius, and Mussweiler 2011).

Social identity theory, according to Henri Tajfel and his colleague John Turner, was based on Festinger’s ideas about social comparisons. Tajfel (1982) outlined some general ideas about

comparisons and the social identities of groups. One of those ideas is that positive and negative evaluations are made based on relational or comparative opinions. For Tajfel, the specific characteristics of a group (e.g., its status or capital) being to gain relevance through comparisons with other groups. What is commonly referred to as social identity is the sum of these self-identifications, and it relates to aspects such as in-group–favoring behavior, intergroup social comparison, prejudices, and positive group distinctiveness. According to Mummendey (1984), there are, in Tajfel’s view, two characteristics of relations between groups: a) the perception of values is stable—changes are perceived as being impossible—or unstable; and b) this stability can be perceived as either legitimate or illegitimate. In this understanding, competition can arise between two groups when the differences in status are perceived as unstable and illegitimate. The general idea here is that social competition arises automatically and spontaneously if reciprocal comparisons are possible and one can differentiate common values. Social mobility can occur only if status relations are perceived as unstable and if at least one group perceives them as illegitimate.

## 1.2 Current State of Research in Social Psychology

In response to the work of Festinger and Tajfel, many scholars began to do research on social comparisons. Buunk and Gibbons (2007) offered a detailed overview of the development of social comparison research in the last five decades, which they classify into five major theoretical developments: classic social comparison theory (mainly Festinger); fear-affiliation theory (particularly in hospital settings); downward comparison theory (e.g., the positive effects of downward comparison, downward shift, and downward comparison under threat), social comparison and social cognition (e.g., self-evaluation, contrast and assimilation, automatic and subliminal comparison), and individual differences in social comparisons (social comparison orientation and positive and negative effects). These authors also discussed the variance between people’s propensity to make social comparisons, and their research indicates that those who are more engaged in it are also more affected by the results of comparisons.

After their extensive study of the social psychological literature on social comparisons, Mussweiler, Rüter, and Epstude (2004) concluded that the consequences of such comparisons are multifaceted and complex. In their work, they investigated how social comparisons influence self-evaluations. Later, Corcoran *et al.* (2011) asked three central questions (similar to Festinger’s) about social comparisons: (1) why do people compare; (2) with whom do they compare; and (3) how does this influence the self? Knowing that people compare themselves to others all the time, these authors asked about the role of such comparisons as a fundamental psychological mechanism that influences people’s assessments, experiences, and



behavior. We will address their second question in more detail in the section on the empirical data.

### 1.3 The Nexus Between Well-Being and Social Comparisons

Another widely discussed strand of social comparison research is that of the realm of health and well-being. Social comparison, which is regarded as a process (Corcoran *et al.* 2011), influences our self-evaluation, subjective well-being, behavior, and motivations. Serious health problems create a situation in which there is a great need for social comparison, according to Festinger's criteria, because "health is of utmost importance, the future is unclear, and there are no objective standards of how to cope" (Corcoran *et al.* 2011:133). Suls, Martin, and Wheeler (2002) examined how upward comparisons benefit those who find it difficult to cope with their situation. In the nexus between serious health problems and social comparisons, one can also find strategies for self-enhancement and self-improvement (see, e.g., Wood *et al.* 1985; Stanton *et al.* 1999; Jones 2001; Thoits 2011; van Deurzen, van Ingen, and van Oorschot 2015). Upward comparisons often educate people about the need for self-improvement and how to achieve it (Taylor and Lobel 1989). Buunk and Gibbons (2007) noted that if people do not need to reveal their inferiority when being compared to others, they prefer upward comparisons. The authors also found evidence that "a number of recent perspectives have emphasized the utility and adaptive function of upward comparisons" (Buunk and Gibbons 2007:4).<sup>3</sup> Wills (1981) showed the latent meaning of downward comparisons, which can create and stabilize a positive self-image and have a positive influence on personal well-being. He distinguished between two types of downward comparisons: one that pursues derogation and degradation (which sometimes leads to physical harm), and a more passive one that provides information about a reference group that is in a worse position. Wills also observed a coping strategy in downward comparisons (see Wills 1997).

### 1.4 Social Comparison in Sociology

In sociology, the debate about social comparison also has a long tradition but has not been as extensive as it has been in social psychology. In their book *The American Soldier*, Stouffer *et al.* (1949) drew attention to the experiences of soldiers who compared themselves

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<sup>3</sup> For a comprehensive discussion of the literature on upward and downward comparisons in general, in populations under threat, in terms of their positive effects, and with regard to avoidance, evaluations vs. affiliation, downward shifts, and conditions moderating the effects, see Buunk and Gibbons (2007).

with other groups and units, which led to dissatisfaction and a sense of deprivation. To capture the spectrum from subjective evaluation to “objective” position, the concept of “relative deprivation” was introduced into the scientific debate (see Delhey and Kohler 2006). Merton and Kitt (1950) used empirical material from *The American Soldier* to develop the first systematic concept of reference groups. Later work by Merton (1968) distinguished between comparisons that involve three different groups of people: those with whom the individual interacts (e.g., relatives, friends, and neighbors); those who are defined as similar in their social characteristics (e.g., in age, gender, or status); and abstract collectives (e.g., citizens in a country). Sociologists such as Merton, but also Runciman (1966), worked on the reference group theory and stated that people always compare their own life circumstances and social status with those of others whom they define as similar, such as in terms of socioeconomic class.

Comparisons also play a role in the sociology of valuation and evaluation. They are concerned with the quantitative measures, standards of valuation, and consequences of or for evaluation and social life, among other aspects (for an overview, see, e.g., Lamont 2012). Jasso (2008) also developed a theoretical framework for sociobehavioral processes by looking at factors that included comparison, status, power, identity, and happiness. In addition, she worked extensively on sociological justice research in general and on earnings and distributive justice in particular (see, e.g., Jasso 1980, 2006). “Most justice theories assert that beliefs about entitlements are based on comparisons of outcomes (and in some theories, inputs) with some standard of reference. These standards may include laws, social rules or customs, the outcome received by another person or group, or outcomes received by the self” (Major 1994:300). In keeping with Major’s (1994) and Festinger’s (1954) descriptions, people turn to different reference categories when evaluating what they are entitled to or what they deserve. Kruphölter, Sauer, and Valet (2015) identified the crucial role of social comparisons (in addition to status and occupation) in justice evaluations and as a “mechanism of any justice evaluation” (Kruphölter *et al.* 2015:18). In a study on pay reference standards and pay satisfaction, Bygren (2004) showed that workers in Sweden are more likely to compare themselves with people on the same occupational pay reference level and national pay reference level than with colleagues at work and their own past pay.

Tajfel’s work was particularly important for the development of the theory of boundary making. This theory is used by Wimmer (2013), among others, in work on ethnic boundary making. Sachweh (2013), in his mixed-method approach to boundary making, showed that people in the higher and middle classes tend to base their comparisons on the socioeconomic and cultural levels, whereas people in the lower classes appear do so more on a moral level.

Qualitative data have revealed that higher-class people also make comparisons on the moral level, which was specific for Germany but not necessarily for other countries. Sachweh has suggested that such comparisons include other forms of categorical inequalities, such as gender, region, and ethnicity, to allow a deeper understanding of boundary-making processes and the reproduction of social inequalities.

According to Mussweiler, “Human judgment is comparative in nature” (2003:472), and many scholars have worked on social comparisons in the areas of judgment and social justice research, particularly on evaluations of income justice. In their study of relative income and life satisfaction in Germany, Wolbring, Keuschnigg, and Negele (2011) found that colleagues and average citizens are more important for the comparisons than friends and relatives. In an analysis of 23 European countries, Präg, Mills, and Wittek (2014) found evidence that comparisons of incomes do not moderate the effects of income inequality on health. The main argument in Burleigh and Meegan’s (2013) article on perceptions of fairness and justice is based on an experiment involving students. The results indicated that individuals with a higher status are uniquely vulnerable to downward mobility when new regulations that offer unequal benefits are implemented in the workplace. These authors demonstrated the important interrelation between fear of downward social mobility and perceptions of justice, and they argued that perceptions of injustice (such as claiming unfairness) are cognitive manifestations of an aversion to any situation that could result in downward mobility.

Gibbons and Buunk (1999) developed and tested the Iowa–Netherlands Comparison Orientation Measure (INCOM), which uses a scale with eleven questions to measure individual differences in comparison orientation in the United States and the Netherlands. Their assessment revealed two things about the INCOM scale: “[the first] factor reflected an interest in performance or ability-related comparisons, whereas the second factor reflected interest in comparison based more in opinion” (Gibbons and Buunk 1999:137). When Schneider and Schupp (2014) reanalyzed the INCOM scale in a pre-test of the Socio-Economic Panel in Germany, they confirmed this two-factor conclusion.

Lindemann and Saar (2014) and Delhey and Kohler (2006) went one step beyond the national analysis of comparisons. In a quantitative cross-national comparative multi-level study of 21 European countries, Lindemann and Saar looked at subjective social positions and how a person’s actual social position and structural contexts (the occupational structure, educational level, and income inequalities in the countries) influenced the estimation of subjective social position (with respect to occupation, education, and income). In general, the better the country’s resources, the higher individuals rate their own position. Delhey and Kohler (2006) analyzed social comparisons with foreign countries and the influence of such comparisons

on personal life satisfaction. Their investigation indicated that more people have a national rather than an international frame of reference, and that cross-border comparisons affect the life satisfaction of people who have some understanding of the life circumstances and standards of average people in other countries. People who feel deprived in relation to other countries are particularly less satisfied with their lives. In these authors' interpretation, upward comparisons play a more important role than do downward comparisons, which also supports Lindemann and Saar's findings. Moreover, comparing oneself "with neighbours, friends and co-nationals has a small effect on life satisfaction in Turkey, a moderate effect in Hungary, and a strong effect in Germany. It seems that the salience of ingroup comparisons increases with national wealth" (Delhey and Kohler 2006:135).

### 1.5 Social Comparison, Migration, and Transnationality

The scholarly debate on social comparisons, migration, and/or transnationality is a relatively young one. Knight and Song (2007) looked at social comparisons of Chinese people who migrated to other villages or cities in China. For people living in rural areas, whether with or without migration experience, the main reference group of comparison was their village of origin. About 70 percent of the respondents saw their home village as the most important reference group and reported minimal distributive injustice in their local society (Knight and Song 2007). Nowicka (2013) addressed positioning strategies of Polish entrepreneurs and the subjective evaluation of migrants as economic capital within a transnational frame. Her research showed that the migrants use different frameworks of comparison, either national or transnational.

Recent research has shown that migrants also compare life chances within transnational spaces of comparisons. Faist *et al.* (2015) asserted that, in a transnational approach, foils of reference (ideas, norms, values, etc.), as well as evaluations and understandings of specific national contexts, can be sharpened by "other" national systems, as when comparing formal protections provided in a welfare state (e.g., health care). "What is 'transnational' in this case is, particularly, the potential that ideas, norms, goods and people all cross borders in a common transnational social space. With respect to people, transnational social spaces are potential spaces of comparison—that is, people compare their social position and their life chances in contexts which may reach across borders" (Faist *et al.* 2015:199). Thus, the "production and circulation of power are seen through discourses of difference" (Smith and Bailey 2004:358). Drawing on the findings of Barglowski *et al.* (2015b), of Bilecen *et al.* (2015), and of Sienkiewicz *et al.* (2015) regarding social comparisons among different migrant groups in Germany (from Poland, Turkey, and Kazakhstan, respectively), Faist and Bilecen (2015) found that these comparisons can lead to the "experience [of] upward social mobility in terms

of formal protection, income and career chances compared to their situation in their region of origin but, when measured against the standards of the destination countries, they rank much further down the social scale, possibly because their educational and occupational qualifications from home are not recognized” (Faist and Bilecen 2015:290). The authors use the social psychological mechanism of relative (dis-)advantage to explain this phenomenon and argue for the crucial role and analysis of perceptions of social positions. In the German–Kazakh social space, for example, Sienkiewicz *et al.* (2015) observed constant comparisons of life chances in both countries in terms of access to social protection, health care, the education system, and life chances for children and especially for pensioners. These comparisons of formal protection perceived as “good” in Germany create new perceived inequalities within multilocally organized families and influence how they organize their informal protection. Relatives in Germany were excluded as recipients of such protection but were included as providers of protection. This work showed how expectations of reciprocity in informal protection within the transnational spaces often diverge from those within the national space (see Sienkiewicz *et al.* 2015).

## 2 EMPIRICAL FINDINGS FROM A PILOT STUDY ON MIGRANTS FROM TURKEY IN GERMANY

### 2.1 The Data: Prospects and Restrictions

The following is a descriptive inquiry into social comparisons of life chances. The data have been drawn from a survey conducted as part of “Transnationality and Inequality: Pilot Project for the Panel Study,” a project of the Collaborative Research Centre 882 at Bielefeld University, which is supported by the German Research Foundation (DFG). Computer-assisted personal interviewing (CAPI) was used to collect information about first- and second-generation migrants from Turkey who were living in Germany through 200 questionnaires. The interviews were conducted by bilingual interviewers (Turkish and German) in the German state of North Rhine–Westphalia in late 2013 and early 2014. One focus of this survey was transnationality and inequalities in education, labor markets, politics, and health (for more detailed information, see Tuncer *et al.* 2015). Access to the field was achieved through communication with Turkish migrant organizations and interviewers’ personal contacts.

Because it was based on personal networks, this sampling strategy resulted in the identification of survey participants whose educational status was similar to that of their interviewers (students or individuals with a higher-education degree). This must be taken into consideration during data analysis and interpretation. The analyses presented in the following are not

representative analyses of migrant groups from Turkey in Germany as a whole, but they do provide information about migrants from Turkey in and around the cities of Bielefeld, Hamm, and Dortmund who are mostly, but not exclusively, well educated. These migrants are also unique in that they are active members of Turkish migrant groups or are in contact with researchers and students at Bielefeld University. The sample consisted of 200 respondents (58.6 percent female and 41.4 percent male), with an average age of 37.4 years (range 18 to 78). As mentioned above, the sample included well-educated interviewees who, when compared with official statistics, are overrepresented.<sup>4</sup> We acknowledge that this affects the generalizability of our results. In our sample, 39 respondents had finished primary school, 77 had completed secondary school, and 76 had a degree from university or a university of applied sciences.<sup>5</sup>

Although the total number of participants (200) set statistical limits for the analysis, it was possible to carry out univariate and bivariate analyses. The findings revealed interesting patterns of comparison and their interrelations with heterogeneities—meaning differences, such as in age, that may influence social inequalities (Diewald and Faist 2011)—which can be used to develop questionnaires to address social comparisons. An explorative (principal component) factor analysis was used to investigate the dimensions behind various items in order to provide more information and a better understanding of potential latent structures with regard to social comparisons.

## 2.2 Who Makes Comparisons?

Before we engage in a deeper analysis of the study data, we would like to mention a more general and surprising discovery. The theory of social comparisons is based on the assumption that the tendency to make such comparisons is universal, and other researchers in this field, such as Gibbons and Buunk (1999) and Schneider and Schupp (2014), have found empirical evidence in support of this assumption. However, many of the respondents in our survey did not compare themselves with anyone and did not answer all the questions pertaining to particular persons or realms of comparison. Table 1 presents the descriptive analysis of their responses.

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<sup>4</sup> According to the Federal Office for Migration and Refugees (BAMF), migrants from Turkey living in Germany are distributed as follows with regard to graduation: 21.0 percent no graduation, 26.8 percent Hauptschule (minimum of 9 years of education), 12.0 percent Realschule or similar (minimum of 10 years of education), 10.0 percent Abitur or Fachhochschulreife (minimum of 12 years education and admission to study at a university or a university of applied sciences), and 29.7 percent still in school or too young for school (BAMF 2014).

<sup>5</sup> Eight responses are missing.

**Table 1 Comparison Groups of Turkish Migrants in Germany (All Respondents)**

<b>With whom do the respondents compare themselves?</b>	<b>Frequency</b>	<b>Percent</b>
Family members or relatives in Turkey	8	4.1
Family members or relatives in Germany	17	8.6
Friends in Turkey	11	5.6
Friends in Germany	49	24.9
Colleagues at work	6	3.1
The German majority society	19	9.6
The Turkish minority society	4	2.0
Other persons	1	0.5
Nobody	81	41.1
Don't know	1	0.5
<b>Total</b>	<b>197</b>	<b>100</b>

Note: Based on data from Project C1.

The first question concerned the main reference groups that participants used when comparing their life situation with that of others. The most frequent response to this question was “Nobody.” Adding the three missing cases and the one person who answered “Don’t know,” we find that 85 respondents did not mention any group with which they compare themselves. Other researchers who used the European Social Survey for their analysis of income comparisons and happiness, such as Clark and Senik (2010), also reported a high proportion of respondents (35.9 percent out of a total of 6,789) who did not engage in any comparisons. In their sample, 73 percent of those respondents who stated that they did not compare themselves with anyone at all also regarded income comparisons with other people as unimportant. Buunk and Gibbons (2006) described various social psychological and clinical studies in which the interviewees were reluctant to admit that they made social comparisons.

The second question concerned comparisons of different social realms. There were five possible answers (ranging from “Strongly agree” to “Strongly disagree”),<sup>6</sup> which were measured according to a Likert scale:

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<sup>6</sup> Because of the ways in which the question and possible answers are worded, it cannot be assumed that the answer “I disagree” means that respondents evaluate themselves as being better off than a person they consider to be worse off—it indicates only that they highly disagree that the person with whom they are comparing themselves is better off, and it can also mean that they are both equal. Studies to be conducted in the future should take note of this distinction and should therefore formulate questions and answers differently. (For example, Question: “When you compare yourself with the person mentioned before, how do you evaluate the life standard of that person?” Answer choices: “Much higher/better, higher/better, same, lower/worse, much lower/worse.”)

**Would you say that the person you compare yourself with...**

- ...has a generally higher standard of living?
- ...is significantly wealthier?
- ...has a better occupational future?
- ...lives in a better neighborhood/district?
- ...finds more support through relatives, friends, or neighbors and the society in which they live?
- ...finds more recognition and respect in the neighborhood and society in which they live?
- ...is politically more engaged and has more influence?

Between 106 and 115 interviewees answered these seven items. When we subtract those who did not answer at least one item, the total number of respondents is 105—nearly half the sample in the pilot study. The 85 missing answers can be explained by the previous question. In addition, one to four of these realm comparison questions remained unanswered by ten other respondents. The question about “success and acceptance from the neighbors and society” resulted in nine missing values, which indicates that this question may have been more difficult to answer, possibly because this is not really something people consider when comparing themselves with others; or perhaps the question itself was not understood or was too abstract in its formulation.

The interviewer reported that comparison questions (the 129th and 130th out of 136 questions) caused some problems of comprehension. During the interviews, these questions had to be repeated, and after they had been repeated, most of the interviewees gave the impression that they did not make such comparisons at all, thus implying that they did not compare themselves with anyone else. These participants mostly picked “Nobody” when asked about their main reference groups. This information could cast doubt on the wording, appropriateness, or comprehensibility of such questions. If it is true that a considerable proportion of people do not compare themselves with others at all, the entire canon that describes social comparisons as a fundamental aspect of human behavior would be undermined.

We performed a descriptive analysis to determine whether there was a pattern behind these two groups (those who compare and those who do not); whether the groups were similar with regard to certain social attributes; and whether some of the interviewees’ attributes may have influenced their reported social comparison behavior. The analysis showed no real differences in terms of gender, citizenship, or income. The findings on gender contradicted those



reported in previous studies on social comparisons that had found that there is a systematic variation whereby men are more likely than women to compare their abilities with those of others (see Schneider and Schupp 2014). Age, however, appears to be an important factor in determining to which group a person belonged (i.e., those who compare or those who do not). With each increasing year of age, the probability that a person will belong to the group of the noncomparers increases by about 3.5 percent.<sup>7</sup>

### 2.3 With Whom Do Migrants from Turkey Compare Themselves (If They Compare at All)?

The participants were asked to indicate the group of persons with whose current life situation they most likely compared their own (see Table 1). Among those respondents<sup>8</sup> who did compare themselves with others and who answered all seven items in the question regarding realms of comparison, their preferences were as follows: friends in Germany (45), family members/relatives in Germany (17), the German majority society (15), friends in Turkey (11), family members/relatives in Turkey (7), coworkers (5), and the Turkish minority society (4). Only one participant stated, “Other persons.” The respondents thus tended to compare themselves with friends (56) and with people living in Germany (82).

**Table 2 Comparison Groups of Turkish Migrants in Germany (N = 105)**

<b>With whom do the respondents compare</b>	<b>Frequency</b>	<b>Percent</b>
Family members or relatives in Turkey	7	6.7
Family members or relatives in Germany	17	16.2
Friends in Turkey	11	10.5
Friends in Germany	45	42.9
Colleagues at work	5	4.8
The German major society	15	14.3
The Turkish minority society	4	3.8
Other persons	1	1
<b>Total</b>	<b>105</b>	<b>100.2*</b>

\* Total percent exceeds 100 as a result of rounding.

*Note:* Based on data from Project C1.

<sup>7</sup> This finding is drawn on odds ratios from a logistic regression model.

<sup>8</sup> To achieve a more homogeneous reference sample for the analyses discussed in this and the following paragraphs, we chose to continue to draw on the 105 respondents who answered all the questions.

To obtain more information about the correlation between personal attributes of the respondents and their reference groups, we conducted a bivariate analysis using the markers of heterogeneity—gender, age, income, and citizenship—because evidence of these personal differences was provided in previous studies (such as the gender differences described by Bygren 2004). For our sample, the analysis showed that the attributes gender, age, and income did not have a significant effect on the reference group of comparisons (i.e., whether the comparison was made with the country of origin or the country they actually live in). However, citizenship showed a strong significant correlation (Cramer's  $V = 0.298^*$ ), indicating that even if the comparisons among all respondents are made mostly with circumstances in Germany, the respondents who had only Turkish citizenship made more comparisons with Turkey than did the respondents who had German or dual citizenship.<sup>9</sup>

#### 2.4 Which Realms Do Migrants Subject to Comparisons?

As shown in Table 3, only 105 participants answered all seven questions about different realms of comparisons. General tendencies were evident in all seven of these realms, indicating that, on average, participants did not tend to see the situation of relevant others as being better than their own. All the mean values exceeded 3 in these assessments, meaning that the respondents neither agreed nor disagreed that the person(s) they compared themselves with had a better life. Thus, we see a clear pattern: the participants generally perceived and evaluated their own position as being “not worse,” and in several realms of comparison they tended to disagree that the other person was in a better position. The highest evaluation concerned political engagement and impact (mean = 3.667), followed by better neighborhood (mean = 3.610) and better personal support (mean = 3.524). But there were also some respondents who strongly agreed or strongly disagreed that their situation was better in every category, as indicated by the range of responses from 1 to 5 on the Likert scale. The standard deviations are similar according to living standard, wealth, occupational future, and political engagement ( $s \sim 1.3$ ). The evaluation of personal support was the most heterogeneous one ( $s = 1.435$ ), indicating a larger variety in this area, one that is important

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<sup>9</sup> One case was excluded from the analysis at this point because the respondent said she/he would compare herself/himself with a different person but did not specify who this person was. For this analysis, we grouped variables related to the emigration country (family/relatives and friends in Turkey and the Turkish minority society) and to the immigration country (family/relatives and friends in Germany, coworkers, and the German majority society).

for life chances. The relatively small deviation for the item “recognition and respect” (s = 1.206) indicates a higher degree of homogeneity.

**Table 3 Realms of Comparison: Mean Values,\* Standard Deviations, and Modes**

Realm of Comparison	Mean	Standard Deviation	Mode
Living standard	3.210	1.299	3
Wealth	3.286	1.342	5
Occupational future	3.476	1.302	4
Neighborhood	3.610	1.312	4
Support from relatives or friends	3.524	1.435	5
Success and acceptance	3.333	1.206	4
Political engagement and political influence	3.667	1.328	5

\* Values are according to the Likert scale (range = 1 to 5).

*Note:* Based on data from Project C1

The general tendency to evaluate the position of the relevant other as being not better has similarities to the “better-than-average effect” described by Alicke and Govorun (2005).<sup>10</sup> However, in our case, respondents did not make comparisons with the average but rather with persons predefined by their answers to previous questions. Therefore, we cannot say with absolute certainty that the respondents actually evaluated their own positions as better.

To obtain more information about the latent structure behind the seven areas of comparison, we conducted an explorative factor analysis. In the first step, a correlation matrix already indicated the opportunity for a good solution in the factor analysis, with always positive and mostly significant correlations being on average between 0.30 and 0.45. The highest correlation was 0.715, between “higher life standard” and “greater wealth.” Values for most of the

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<sup>10</sup> See Moore (2007) for an extensive discussion about the limitations and prevalence of this approach and the so-called “worse-than-average effect.”

correlations have already indicated a general relatedness between the items, which also confirmed a correlation between potential factors in the factor analysis.

The principal component factor analysis using the Kaiser criterion (i.e., extracting just those factors with an eigenvalue greater than 1) with a promax rotation suggested a two-factor solution.<sup>11</sup> We interpret the results of this analysis as follows: The first factor has an eigenvalue of 3.123, and three items score on this factor, namely living standard, wealth, and occupational future.<sup>12</sup> This factor can be labeled “economic living standard comparison.” The second factor (eigenvalue = 1.093) consists, in our interpretation, of “personal support” and “recognition/respect.”<sup>13</sup> This factor can be described as “emotional living standard comparison.” “Better neighborhood” shows no clear loadings, and “political engagement and influence” has a tendency to represent “emotional living standard comparison,” but the loadings for these items are not sufficient and the communality is too low. Both factors correlate moderately with each other (0.442), which indicates that those who compare economic living standards also tend to compare emotional living standards. In addition, this shows that these factors are not too similar to each other and that each construct measures something different. These findings can be interpreted as a small contribution to answering the question Panning posed in 1983: what other aspects are involved in individuals’ comparisons (aside from income and wealth) that contribute to relative deprivation? Emotional characteristics such as recognition and respect might also be interpreted as a realm in which people can feel relatively deprived and perceive social inequalities. What Berta, the migrant from Turkey in Germany who was quoted at the beginning of this paper, said also describes this tendency.

Lastly, the empirical analysis focused on economic and emotional comparisons, for which we constructed two indexes,<sup>14</sup> as well as their interrelation with heterogeneities and comparison

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<sup>11</sup> The Kaiser–Meyer–Olkin (KMO) value measuring the sampling adequacy of a factor analysis is fulfilled with an overall value of 0.7933, which can be regarded as middling (nearly meritorious), according to Kaiser (1974). The data set is good enough and the variables have enough in common to warrant a factor analysis

<sup>12</sup> The loadings, in detail, are: living standard = 0.852, wealth = 0.681, and occupational future = 0.898. The communalities are good, with values of 0.743, 0.722, and 0.664, respectively.

<sup>13</sup> The loading for “personal support” is 0.873 (communality = 0.653), and that for “recognition/respect” is 0.756 (communality = 0.595). Following the recommendations for factor analysis made by Bühner (2011), who noted that for a sample  $n > 100$  the communalities should be at least 0.50, we can see that our data meet this criterion, having communalities between 0.63 and 0.77. A disadvantage in our measurement is that we ultimately rely on only five items for a two-factor solution, which could be considered to be too little, because Bühner (2011) and others recommend using at least four items for every expected dimension. Quantitative analysis to be conducted in the future should contain more questions in each of the different expected dimensions of social comparisons.

<sup>14</sup> The two indexes are the sum of the two and three variables, respectively, divided by the number of variables. Because we found a relatively high positive correlation within the items for the two latent dimensions, and thus assumed that they measured similar latent constructs, we decided to reduce the content of the data by construct-

references. Women tend to have a higher score than men in economic and emotional comparisons,<sup>15</sup> but this finding indicates no statistically significant difference between these two means in both groups. There was a low correlation between age and emotional comparisons (Pearson's  $r = -0.186$ ,  $\alpha = 0.0592$ ), indicating that the older people are, the less they consider their own position to be better by emotional standards. Income does not correlate with these items.

A very interesting finding was the difference in the mean values between reference of comparison and emotional comparisons. The difference between those who compared themselves with persons related to Germany (3.573) and those who compared themselves with persons related to Turkey (2.818) was highly significant. Those who tended to compare themselves with persons in Turkey evaluated the emotional standard of the people in Turkey as better as their own; however, we did not see this tendency among those who compared themselves with people related to Germany, which indicates a possible perception that emotional standards (“support” and “acceptance”) are believed to be better in Turkey by those respondents who see their main reference point of comparison in Turkey. This tendency in transnational comparisons may be regarded as similar to the “worse-than-average effect” (see, e.g., Moore 2007). Under these two circumstances (people who compared mainly with the Turkish reference and in the dimension of emotional standards), there was a different general tendency, namely that people did not tend to see the comparison group as better. This finding may be interrelated with another perception of migrants from Turkey in Germany concerning emotionality and personal well-being in Turkey—at least for those who see the people there as the most important for comparisons—and adds to Delhey and Kohler's (2006) study from a cross-national perspective. These authors revealed that, on the national level, not all people are necessarily more likely to compare life satisfaction within the borders of those countries that have increasing national wealth. In the Turkish–German transnational space, we see that for those who compared themselves with people in Turkey in social realms, the social life of others in the less wealthy Turkey was perceived to be better. This can also be interpreted as one dimension of life satisfaction. Once again, these results indicate the advantages of studying processes of social comparison on the transnational level as well as on national and group levels.

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ing indexes.

<sup>15</sup> The mean values for economic comparisons were 3.143 for men and 3.444 for women (3,369 and 3,468, respectively, for emotional comparisons).

### 3 DISCUSSION

In the first part of this paper, we presented an extensive review of the literature concerning social comparisons in the fields of social psychology and sociology. The findings indicated a recently emerging area (for both these disciplines and as a cross-disciplinary field): that of international migration and transnationality. This field can be linked to several known mechanisms that are discussed in inequality studies (such as relative deprivation and boundary making) and enables connections with, for instance, relational sociology studies in its multi-level approach to the study of social comparisons on the individual level (as in the work of Festinger), the group level (as in the work of Tajfel), and more abstract levels (such as among citizens within a country, as suggested by Merton). According to Mussweiler *et al.* (2004), the consequences of comparisons observed and described in social psychology are multifaceted and complex. One suggestion that can be drawn from social psychology and applied to further research in sociology is a more systematic analysis of social comparison. One possible approach to achieving a systematic scheme of analysis is to differentiate among comparisons that involve the social dimension (to whom?), the content dimension (in which realm?), and the time dimension (when?). (This third dimension is not mentioned in Festinger's work but was introduced into social comparison research by Albert 1977.) These dimensions follow Niklas Luhmann's (1984) differentiation of social meaning. Such a scheme of analysis would allow for a systematic study of the individual realms of comparison separately but also in terms of their interrelations. The result would be a deeper understanding of social comparison processes.

The empirical analysis of social comparisons migrants from Turkey in Germany, as discussed in the second part of this paper, indicates that nearly half the participants in our study mentioned that they do not make comparisons. The only difference in the personal characteristics of those who compare and those who do not was related to age (the probability of making comparisons decreased with increasing age of the participants). In all the realms tested, the participants also evaluated their own lives as being not worse when compared with the reference groups. The main reference groups were predominantly people in Germany. The factor analysis showed that the comparisons appeared to have an "economic living standard" dimension and an "emotional living standard" dimension, and these factors were also interrelated with each other. In the emotional dimension, we found evidence that those who compared themselves mainly with people in Turkey also evaluated their emotional aspects (such as social support, respect, and recognition) in Germany as being not better than in Turkey. The findings from this small pilot study revealed new possible questions about social comparisons, migration, and (perceived) social inequalities. For a more systematic analysis, it will be necessary to study this topic in more detail. In this final section, we will provide a brief

overview of important and interesting questions to be considered in future research and for possible operationalizations.

The empirical findings presented have raised new questions about how to study social comparisons in general. Many of the respondents reported that they do not compare themselves with others at all, which, at first glance, contradicts the basic premise of most of the social psychological literature on social comparisons that social comparison is a fundamental mechanism used on a regular basis by every person in everyday life for the purpose of (self-)evaluation and positioning. This fundamental idea may seem convincing, but many studies have demonstrated quantitatively that people tend to answer that they do not make social comparisons (see also Buunk and Gibbons 2006; Clark and Senik 2010). Further research should pay more attention to this phenomenon and try to find more systematic answers and explanations for it. It might be that such a contradiction is the result of the way these comparisons are operationalized. One possible way to overcome this type of response might be to ask interviewees less direct answers and use a vignette technique instead, as suggested by Jasso (1990).

As van Deurzen *et al.* (2015) have noted, the available data are not sufficient for a comprehensive analysis of the role of social comparisons in inequalities. Aside from this general need, and based on the empirical findings in our pilot study, it will be interesting to find more indicators of the emotional and financial dimensions of comparisons to test the validity of this statement. Two more questions remain: are there perhaps other dimensions besides emotional or economic ones; and what role may factors such as jealousy play in comparisons? It might be interesting to integrate the IOWA scale from Gibbons and Buunk (1999) to see if comparisons of abilities and opinions also involve emotional and economic standards.

Another starting point for studying social comparisons might be a mixed-methods design, as suggested by Lindemann and Saar (2014). In quantitative research, the researcher pre-defines potential reference groups for comparison and offers respondents a selection of possible choices (for a review of the literature on income comparisons, see Clark and Senik 2010). One suggestion would be to develop a more open questionnaire, build open categories, and ask in several more steps for more information about respondents' reference person (age, education, location, etc.). One way to achieve more openness is to conduct qualitative interviews and quantitative questionnaires together. This should provide new and complementary information about other relevant groups and dimensions of comparison or will test pre-existing ideas. Social network analysis can be a useful tool to integrate qualitative and quantitative research on social comparisons. "Comparisons maps" could be created during the qualitative interviews, and additional information for quantitative investigation could be gath-

ered. (For a similar design exploring migrants' informal social protection in transnational social spaces, see Barglowski *et al.* 2015a; for an overview of qualitative and quantitative data in social network analysis and its visualization, see Bilecen 2013.) Such comparisons maps could also help interviewees name and visualize relevant people, groups, and dimensions of comparison.

This mixture of methods will help us understand why some people state that they make comparisons while others do not. The evidence derived from such studies will contribute to the development of more appropriate items and questionnaires for the study of social comparisons and will link to more general theoretical discussions in relational sociology, such as those presented in the work of Charles Tilly (2002) and Harrison White (2008).

The qualitative empirical findings of Faist *et al.* (2015) indicate that transnationality plays an important role in the (re-)production of social inequalities in transnational spaces of comparisons. Our quantitative empirical findings also show that the respondents who compared themselves more with people in Turkey tended to evaluate the emotional standards in Turkey as being better than in Germany. It could be fruitful to conduct a more detailed and comprehensive investigation into the transnational linkages and persons, as well as into their influence on social comparisons, evaluations, and expectations. Panning noted that “we need to investigate the criteria upon which selection is based, which, in addition, may differ substantially among different cultures” (1983:329).

Another question to be addressed is: what are the similarities and differences in transnational social comparisons on the individual level and the group level? It might be interesting to use a more multilevel approach to social comparisons and to include questions about self-evaluation (as suggested by Festinger) and “objectified” multiple social group identification/inclusion (as suggested by Tajfel). Such questions will also contribute to broader questions, such as the transnational social question (Faist 2014), which in turn will contribute to our understanding of social inequalities and life chances.



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