

Understanding Social Class in Mexico: An Intersectional Framework

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Social class inequality is increasing in countries around the world. Understanding and measuring social class has long been dependent solely on income data. This research note examines the situation specific to social classes in Mexico and provides a preliminary framework to measure social class using three criteria: wealth, skin color, and English-language proficiency. Methods to validate the accuracy of the index are also suggested for future research. The intersectional nature of the proposed index will allow policymakers and scholars to gain a better grasp of the interactions between different factors that contribute to differences between social groups.

Keywords: social class; multicriteria score; intersectionality; skin color; English proficiency; intergenerational wealth

La desigualdad entre las clases sociales está aumentando en países de todo el mundo. La comprensión y medición de la clase social ha dependido durante mucho tiempo únicamente de datos sobre los ingresos. Esta nota de investigación examina la situación específica de las clases sociales en México y proporciona un marco preliminar para medir la clase social utilizando tres criterios: riqueza, color de piel y dominio del inglés. También se sugieren métodos para validar la precisión del índice en futuras investigaciones. La naturaleza interseccional del índice propuesto les permitirá a los responsables de la formulación de políticas y a los académicos comprender mejor las interacciones entre los diversos factores que contribuyen a las diferencias entre los grupos sociales.

Palabras clave: clase social; puntuación multicriterio; interseccionalidad; color de la piel; dominio del inglés; riqueza intergeneracional

1. Introduction

The past four decades have yielded a broad trend of rising wealth inequality within industrialized nations (Mills 2009; Rani and Furrer 2016; Alvaredo et al. 2017;

Arundel and Ronald 2021). Since the 1980s, wealth in Europe, China, and the United States has concentrated in the hands of few (Zucman 2019). Zucman shows that Western European countries have less inequality than they did at the beginning of the twentieth century, while Russia, China, and the United States have returned to similar levels of inequality as the beginning of the twentieth century despite post-WWII improvements in wealth equality. Moreover, Western European countries, with the advent of more socially driven policies, have been able to slow the concentration of wealth. In former communist states, rapid privatization of assets led to a concentration of wealth. In the United States, neoliberal policies enacted since the 1980s have contributed to a widening of the wealth gap (Zucman 2019).

Mexico, like the United States, has favored platforms that have contributed to the growth of wealth inequality since the 1980s. More specifically, inequality has been on the rise in Mexico, with the top 1% most wealthy owning 40% of the country's total wealth in 2000 growing to almost 50% in 2022 (World Inequality Database 2023). Successive Partido Revolucionario Institucional (PRI) and Partido Acción Nacional (PAN) governments have led the country to widening wealth inequality through neoliberal policies. Movimiento Regeneración Nacional (MORENA), a left-wing populist party in power since 2018, has sought to reverse this upward trend in inequality mainly by reducing the pay gap between the strata of workers in Mexico and exercising state responsibility over natural resources (Lucca 2020). This has put class struggles at the forefront of the country's political agenda and created political fault lines across social classes, often pitting the well-educated, upper-middle class against the lower classes, who felt abandoned by previous governments.

Social class and redistribution of capital are retaking the spotlight in many countries' public debates, sparking fierce political commentary (Voorheis, McCarty, and Shor 2015; Winkler 2019). In the context of growing inequality, belonging to a higher social class means progressively accumulating more wealth (Hansen and Wiborg 2019). As social mobility becomes more difficult and the quality of life is eroding for a large part of the population, actors from different sides of the political spectrum espouse solutions to reduce inequality (Ordabayeva 2019) and provide individuals with mechanisms to possess equal chances of succeeding economically. The borders of social classification are often defined by using occupation or income data (Savage et al. 2013). As such, social mobility and evaluating the social class of a citizen has largely been based on these factors.

However, one's social class is not necessarily based only on earnings (Näre 2013; Rubin et al. 2014; Strand 2014). Family background and ethnic origins are also factors that are highly correlated with a person's social class. The intersection of some of these factors translates into varying economic outcomes but also relates to one's social standing. In multiracial contexts, a person's skin color can also influence the

perception of one's social class by referencing historical stereotypes regarding different racial groups' economic success (Telles, Flores, and Urrea-Giraldo 2015; Hunter 2016; Keith et al. 2017). In non-English speaking or multilingual countries, knowledge of English is strongly related to social mobility (Tsiplakides 2018; Haidar 2019; Li 2019). The perception of an individual's social class can thus change depending on how these factors intersect. Solving a country's problems related to economic inequality requires understanding the structural components of social class.

Mexico is a good example of a multiracial (Sue 2023) and multilingual (Gorter, Zenotz, and Cenoz 2016) country with a high level of economic inequality (Campos-Vázquez, Lustig, and Scott 2018). Strict social class boundaries are mainstays of everyday life (Bayón and Saraví 2013), and social mobility is low (Delajara, Campos-Vázquez, and Vélez-Grajales 2020). Prior research specific to the Mexican context has been conducted on intergenerational wealth and social mobility (Velez-Grajales and Velez-Grajales 2014; Delajara and Graña 2017), the effect of skin color on economic outcomes (Campos-Vázquez and Medina-Cortina 2019; Monroy-Gómez-Franco, Vélez-Grajales, and Yalonetsky 2022), and the influence of knowing English on employment outcomes (Sayer 2018). However, no study has yet dissected the intersectionality of these three criteria in how social class is understood in Mexican society. While the current president, Andrés Manuel López Obrador, is committed to reducing social inequality (Magana Huanosto 2020; Castro-Rea and Centeno Garcia 2021), his approach generally is rooted in a traditional interpretation of social class and does not apply an intersectional perspective, or one that includes race and language, to the country's inequality problem.

A better understanding of Mexican social classes through an intersectional lens undoubtedly will help policymakers make better decisions and shape policy to reduce societal inequities. Lots of research has delved into the social implications of wealth, skin color, and language. However, as far as I know, no index that includes wealth, skin color, and language proficiency to understand social class exists in any context, including the Mexican one. Given that understanding social class is a multifaceted and complex problem, this index is a valuable tool that could help solve it. Moreover, the preliminary framework developed in this article is a theoretical contribution to the study of social class in Mexico, and the research proposed here could be applied to any other multiracial country in which English is not the primary language.

2. Understanding Social Class in Mexico

Mexico is a country with a high level of economic inequality among its constituent states, but also within its cities everywhere in the nation (Delajara and Graña 2017). The effects of this inequality are palpable in many spheres of life (Bayón and Saraví 2013). Infrastructure does not escape this reality, with gated communities, expensive

private universities, and a two-tier healthcare system being facts of life in Mexico. Upper classes try to interact with people of their own social standing and avoid poorer or more indigenous people (Krozer 2020). The taboo of being called *clasista* (classist) or *elitista* (elitist) makes broaching the topic of social class a bit more difficult but, nonetheless, ever so present. Mexican slang denotes the importance attributed to social class, with expressions such as *fresa* (denotationally strawberry, connotationally snob, upper-class prep) or *junior* (of inherited wealth or unearned privilege granted by birth) (Holguin Mendoza 2018) being used to underline the naivete or undeserved privilege of the upper classes, and *naco* (ignorant or vulgar person who lacks education) or *chacal* (denotationally jackal, connotationally dangerous, delinquent, or aggressive person, of lower socioeconomic status) being used to highlight the trashiness or danger associated with the lower classes. Yet, it is important to note that referring to one's social class in Mexico is not solely based on wealth. The terms presented above intersect with linguistic and racial factors (Holguin Mendoza 2018; Krozer 2020). A term that is increasingly in use is that of *whitexican* (portmanteau of "white" and "Mexican"), which typically refers to rich, light-skinned, English-speaking Mexicans, underlining the intersectional nature of social class perceptions in Mexico.

While an intersectional perspective is crucial in understanding social class in Mexico, wealth is assuredly a factor that greatly influence one's social standing (Bayón and Saraví 2013). This is because where you can live, the education you can access (Torche and Spilerman 2009), and health outcomes (Esposito et al. 2020) are greatly influenced by the financial support your parents can offer you. In a country like Mexico, where income is low, and unemployment is higher than in countries like Canada or the United States, financial support and household assets provided by parents become more important (Torche and Spilerman 2009). Because of the important wealth inequality in Mexico (Delajara and Graña 2017), Mexican upper classes have an interest in maintaining their social standing (Krozer 2020). This can lead to people of similar status sticking together and creating barriers, reducing the opportunities for social mobility. This makes the wealth of one's family a factor that tends to make social status persistent. In fact, Delajara, Campos-Vázquez, and Vélez-Grajales (2020) show that there is far less social mobility in Mexico than in Canada or the United States, with social mobility being the most persistent in the southern regions of Mexico.

Beyond one's family's wealth, the family's physical traits are also an important part of social class determination in Mexico. The colonial legacy of Spain's control over Mexico has resulted in widespread colorism across all regions of the country. Darker skin is associated with being a descendant of colonized indigenous peoples (Holguin Mendoza 2018) or slaves brought to Mexico during the transatlantic slave trade (Sue 2023), while lighter features are associated with being a descendant of European

settlers. Lighter features are considered more desirable and typically are associated with having means. There also has been shown to be a direct correlation between skin tone and economic outcomes, with darker skin tones associated with 53% lower earnings than their lighter-skinned counterparts (Campos-Vázquez and Medina-Cortina 2019). Many multiracial countries that suffered from colonization are affected by this paradigm.

Finally, knowing English can act as an important component in determining social class in Mexico (Sayer 2015). This is mainly because knowing English is perceived as allowing people to access better job opportunities and to seek educational opportunities both in Mexico and abroad (Sayer 2018). Parents try to send their children to private schools that ensure the highest level of English proficiency (López-Gopar and Sughrua 2014), often spending large amounts of money. The top private universities of the country prioritize English-language instruction by offering programs and classes that are fully in English (Berry and Taylor 2014). Unlike the country's public universities, which promote Spanish-language instruction, private universities often will hire professors based on their capacity to teach in English rather than their research output. This is a testament to the importance of English-language instruction to their business model and to their customers—students wishing better economic opportunities. This reality is true for many countries where English is not the main or official language.

3. A Multicriteria Index

This is not to say that lighter skin tone or knowledge of English alone will afford someone a higher social status. However, it is the intersection of intergenerational wealth, skin color, and level of English that can help us understand a person's social class. We can think of these factors as three dimensions of social class in Mexico. To this end, these dimensions can be understood as components of an aggregate score:

$$S_i = a \cdot IW_i + b \cdot ST_i + c \cdot EL_i$$

Where S_i is the aggregate social class score of individual i , IW_i is the intergenerational wealth score of individual i , ST_i is the skin color score of individual i , EL_i is the English-language knowledge score of individual i and a , b , c are component weights of which the sum is equal to 1.

The intergenerational wealth score is based on the percentile rank of the individual's household wealth at the country level. Wealth can be understood as the net worth of a person or household, the value of all assets owned and net of all liabilities owed at a point in time. The skin color score is based on the PRODER (Solís, Güémez, and Vázquez 2023) skin color scale, designed for Mexico's context. The English-language knowledge score is based on the Common European Framework of Reference (CEFR) (Council of Europe 2001) for language proficiency. All three scores are brought back

onto a scale of 0 to 1 (Table 1). The score weights have yet to be determined in further research. Table 1 shows the components of the aggregate score and the normalized score conversions.

Table 1: Components of the Social Class Index

Component	Categories	Normalized score (0 to 1)
Intergenerational wealth	Percentile ranks	The percentile rank is divided by 100
Skin color (PRODER)	K	1.00
	J	0.90
	I	0.80
	H	0.70
	G	0.60
	F	0.50
	E	0.40
	D	0.30
	C	0.20
	B	0.10
	A	0.00
English-language proficiency (CEFR)	C2	1.00
	C1	0.80
	B2	0.65
	B1	0.50
	A2	0.35
	A1	0.20
	Less than A1	0.00

4. Implications and future research

Intergenerational wealth, skin color, and knowledge of English have a strong relationship with a person's social status in Mexican society, and the concatenation of these factors creates unique barriers for some and opportunities for others. These three factors are highly correlated in Mexican society and are found together. Lighter skin color is associated with being the descendants of European settlers, who had more economic power in colonial Mexico than their indigenous counterparts. These inequities have defied the test of time and are still palpable in families' balance sheets today. In turn, having more wealth today allows for a higher level of education and opportunities to study abroad. Thus, it is no surprise that the best English speakers in Mexico are generally from well-to-do backgrounds. To close the circle, better knowledge of English systematically leads to better employment opportunities and

higher salaries, helping the privileged game the system and conserve their economic power.

One also can ascertain the concatenation of wealth, skin color, and English-language proficiency by examining the realities of rich states in Northern Mexico versus poorer states in Southern Mexico. In states in the North, such as Nuevo León, people are lighter-skinned due to historical immigration patterns, tend to speak English because of the proximity to the United States, and generally are perceived as having more money than southerners because of the economic productivity of some northern states. Conversely, in southern states such as Chiapas, people are darker-skinned and viewed as more indigenous, tend to have lower English proficiency, and are viewed as less economically productive. A person's origin within the country often is used as a proxy for partially determining one's social class, and the persistence of social class in Mexico is also region-specific (Delajara, Campos-Vázquez, and Vélez-Grajales 2020), with more persistence in poorer southern states. The differences between states in economic development has a lot to do with the proximity to the world's largest economy, which has made more northern states develop more complex economies (Chávez, Mosqueda, and Gómez-Zaldívar 2017). While a darker-skinned person from Northern Mexico may have better economic opportunities than a lighter-skinned person from the South, the perception of class related to regional stereotypes within the country may negatively influence the former's social experience.

The social class paradigm presented in this paper argues that the perception of class through regional differences is due in part to the core factors of wealth, race, and educational opportunities. Existing research is insufficiently attentive to skin color and language proficiency. One's class position should also be determined using factors other than wealth. The framework described in this paper offers a different understanding of social status that is not solely based on traditional economic definitions. It can help scholars, policymakers, and ordinary citizens gain a better grasp on how a person's social class is perceived. This is crucial because a person who is darker-skinned, of low English proficiency, and with no intergeneration wealth will face unique challenges that a framework solely based on income will not underline.

Furthermore, the multicriteria framework described in the previous section opens many different research avenues, both quantitative and qualitative. The first crucial step in better defining the framework is to determine the weights of the three score components. To do this, an econometric analysis that estimates the influence of each component on economic outcomes would be a good way to establish the relative importance of each component. Public datasets containing earning, wealth, and skin color information, as used in past studies (Campos-Vazquez and Medina-Cortina

2019; Monroy-Gómez-Franco, Vélez-Grajales, and Yalonetsky 2022), could be complemented by surveys that collect information specific to English-language proficiency.

The relationships between the different score components also could be examined to better understand the intersections between different factors of marginalization. Afterwards, interviews could be conducted with small groups of people where each group member presents information about themselves, and the other group members attribute their own social class score. These scores would then be compared to the empirical scores calculated using the framework presented in this paper and data regarding the interview participants. This would test the accuracy of the framework. Once the score framework is validated, score values could be computed for individuals across states, cities, and neighborhoods in the country.

This research has the potential to make an important impact on Mexican society, and also on how social class evaluation through an intersectional lens is understood worldwide. The framework developed in this paper, once properly validated, is general enough to be used in several different contexts across the globe. Many Central and South American countries, such as Peru, Bolivia, Paraguay, Guatemala, Nicaragua, El Salvador, and Honduras, have similar realities in terms of social mobility, racial makeup, and English-language proficiency. The index easily could be applied to these countries with little or no changes. Other multiracial countries in Latin America, such as Colombia, Ecuador, and Brazil also could benefit from the application of this index, albeit with a few modifications to account for different skin tones. To some extent, all nations that are multicultural, multiracial, and for which English is not the most spoken language could be candidates for the use of this index. France, Germany, Italy, Belgium, Quebec (Canada), Singapore, and the Philippines come to mind. For these countries, the scales, weights, and variables most likely would have to be tweaked to accommodate regional particularities.

Not only would a validated scoring method be an important contribution to demography scholarship, but policymakers and government officials could use the score to better plan programs dedicated to reducing inequality by adopting intersectional approaches that do not take income alone into account. Devising programs to direct resources towards marginalized groups could be thought of in terms of this index's scores, rather than just using income or job status as qualifying factors. Welfare programs, healthcare access incentives, and educational funding are some of the policies that could use an intersectional approach. As social inequality is growing worldwide, and voters in many democracies are increasingly becoming aware of the challenges related to social mobility, the research that might stem from the framework suggested in this article could become beneficial to a wide variety of stakeholders.

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