

Chapter 1

Measuring Demographic and Socio-Economic Variables in Cross-National Research

An Overview

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1. INTRODUCTION

In the context of cross-national research the comparative measurement of demographic and socio-economic variables has not received much attention in the social sciences so far. Though there are many books and numerous articles dealing with measurement problems in cross-national research (*e.g.* Kohn 1989; Lonner and Berry 1986; Niessen and Peschar 1982; Øyen 1990; Przeworski and Teune 1970; Saris and Kaase 1997; Szalai and Petrella 1977), only very few concentrate on the specific problems of comparing background variables across nations (a comprehensive discussion can be found in Braun and Mohler 2002; discussions with respect to particular variables are, for example, presented by Braun and Müller 1997; Inkeles and Rossi 1956; Schweitzer 1979; Treiman 1977). The main objective of this volume is to help fill this gap, at least, with regard to comparisons between European countries but many arguments made by the authors in this book and most of the instruments presented here will also be applicable to countries outside of Europe. However, one should be especially cautious when researching countries with totally different cultural traditions situated in diverse developmental stages (Jowell 1998; Küchler 1998; Scheuch 1989).

Demographic and socio-economic variables, often also called background variables, “contain information necessary to define homogeneous subgroups, to establish causal relations between attitudes and societal facts, and to define differences between scores on scales. In short, they allow us to define contexts in which respondents’ opinions, attitudes, and behavior are

socio-economically embedded” (Braun and Mohler 2002: 112). Though we will not make the attempt to develop a comprehensive list of background variables (in this respect see Zetterberg 1965: 58-60), there should be wide agreement that measures of age, sex or gender, education, status in employment, occupation, nationality, ethnicity, and household or family related variables are all attributes that fall into this category. Even though background variables play such a central role in social research, be it national or cross-national, the measurement problems these variables pose are only rarely addressed in detail and, as was mentioned before, books specifically dealing with these problems are hard to find. With the current volume we hope to improve this situation for those interested in cross-national social research.

The main driving force behind the effort to edit this volume is our conviction that instruments allowing the compatible measurement of demographic and socio-economic variables are badly needed. The ever growing number of European research projects and the fact that research today is more and more frequently funded by European institutions (e.g. the European Commission or the European Science Foundation) will increase the demand for such instruments in the future.

This book is primarily directed towards scientists involved in cross-national research such as the International Social Survey Programme, the European Social Survey or the World Health Survey. Although these researchers come from various disciplines – e.g. sociology, political sciences, psychology, economy, epidemiology – they all have the common problem of harmonising the measures of background variables in comparative perspective. In other areas of research, especially in market research and in the field of official statistics, there is a somewhat longer tradition of working on harmonised measures. The globalisation of markets and the process of European integration both resulted in pressing needs for the comparative measurement of demographic and socio-economic variables. We have therefore included contributions from representatives of these two research areas in this volume, since we believe that they have much to add to the topic presented here.

The title we have chosen, is intended to indicate our purpose to present a ‘working book’, i.e. a book presenting the ongoing work with respect to the measurement of background variables and serving as a reference source for this matter. Since this line of work is far from complete and a standardised commonly accepted instrument for the measurement of background variables is not in reach so far, the volume is not a handbook but only reflects the developments achieved up to now. We hope to be able to update the book periodically to extend the discussion to more variables and include new measurement instruments.

2. GENERAL ASPECTS OF CROSS-NATIONAL RESEARCH

To be sure, the harmonisation of background variables is only a relatively small, although important aspect in cross-national research. Other problem areas include the comparative measurement of opinions and behaviours, sampling techniques, the mode of data collection, data coding and processing (for a recent overview of problems in cross-national research see Harkness, van de Vijver, and Mohler 2002). With respect to survey questions regarding opinions and behaviours special translation techniques have been developed that help assure functional equivalence of indicators. Since some excellent texts are available that cover these techniques we do not discuss them in this volume (see, for example, Behling and Law 2000; Harkness and Schoua-Glusberg 1998; Mohler, Smith, and Harkness 1998).

Nonetheless, it should be stressed that in addition to translating survey questions from one cultural context into another, questions concerning the design of the study have to be solved. For instance, the comparability of two or more data sets is only guaranteed if the sampling frames and sampling procedures are compatible, *e.g.* random samples, and if the sampling is carried out in a comparable form. Of course, this depends on the kinds of registers or alternative techniques available for sampling the target population in the countries involved and the comparability of these registers or techniques. What makes the situation even more complicated is that the optimal sampling approach not only is contingent on the target population but also depends on the mode of data collection. Hence, comparable random samples for telephone surveys differ considerably from samples for face-to-face interviews and these in turn differ from samples for mail surveys. The mode of data collection does not only influence the sampling procedure but has implications for the design of the questionnaire and the wording of questions, too. Of course, all these points do not only apply to international research but also to comparisons of different national studies. However, since national conventions differ in all of the above mentioned areas these problems are more pronounced in cross-national studies. Consequently, studies from different countries are only comparable in the strict sense if all of these problems are considered and every measure is taken to conduct the studies in the same way. Obviously, this is an ideal situation that will never fully be achieved. But it should be clear that the more the studies that shall be compared depart from this ideal situation, the less comparable they are.

General discussions of the different aspects of sampling and data collection are beyond the scope of this volume. However, in those cases where these problems are directly related to specific variables they are discussed in the respective chapters, *e.g.* in Chapter 18 in connection with the measure-

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