

Relative Deprivation and Hey and Lambert's Motivation: Mixed Methods Evidence from Rio de Janeiro

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Hey and Lambert (1980) provided an interpretation of indices of relative deprivation in terms of interpersonal comparisons: the indices would quantify harmful feelings of frustration, inadequacy, and inferiority arising from looking upward to better-off others. A growing body of literature has followed this interpretation in quantitative studies which indeed typically reveal a negative association between relative deprivation and key social outcomes such as happiness, health, and education. Yet, evidence able to directly link a negative coefficient of relative deprivation to the mechanisms deflating and harmful for the self, which underlie Hey and Lambert's interpretation, is currently lacking. We fill this gap by conducting a mixed-method study. Using data from three waves of Brazilian high-stake secondary education exams for the state of Rio de Janeiro ($N = 245,555$), we first analyse exam scores in econometric models where absolute income and relative deprivation are jointly employed as explanatory variables. Next, we interpret and expand upon our quantitative results using primary data collected via semi-structured interviews and focus group discussions with 30 local secondary school teachers. In conformity with Hey and Lambert's interpretation, we find robust negative coefficients for relative deprivation, which the teachers explained by reporting the detrimental effects of lower socioeconomic status and upward comparisons on pupils' self-esteem, motivation, and aspirations.

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Introduction

Describing economic inequality, as well as explaining its causes and consequences, has been at the heart of economics since the first steps moved by the discipline. In order to monitor changes in inequality over time, portray regional differences, and study the causes and effects of economic inequality, the availability of sound measures able to quantify the phenomenon is essential. Over time, an army of scholars has engaged with the development of measures able to assess economic inequality – providing researchers interested in the study of the haves and have-nots with a formidable array of tools (Lambert 2002, Cowell 2011). In order to account for multiple aspects and conceptualisations of economic inequality, different approaches to measurement have been followed and different indices have been developed. A key element for the soundness of a measurement tool is the conceptualisation of the human condition it is expected to quantify – *i.e.* the motivation behind its use.

This article focuses on one specific approach to the study of economic inequality, namely the use of individual-level indices meant to quantify individual disadvantages (or advantages) relative to others in society. While inequality in its most fundamental understanding is an aggregate concept representing the extent of economic disparities in a group of individuals, measures of relative deprivation and relative satisfaction¹ portray, at an individual level, the way inequality impinges on individuals located at different points along the economic ladder. Our aim is to employ relative deprivation as an explanatory variable in customary quantitative analysis and seek insights that may further our understanding of how this variable can be interpreted.

More specifically, this article investigates the role of relative deprivation as a predictor of educational outcomes. To achieve our objectives, we follow a mixed-methods design aiming to produce quantitative evidence and shed light upon it via qualitative methods. We estimate econometric models in which both absolute income and relative deprivation are used as predictors for educational achievement. This quantitative analysis is based on secondary data from three waves of the Brazilian high-stake secondary education exams, Exame Nacional do Ensino Médio (ENEM), for the state of Rio de Janeiro (years 2016–18, N=245,555). The qualitative part of our article draws on fieldwork data, which we collected through semi-structured interviews and focus group discussions with 30 secondary school teachers in