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RELIGIOUS AFFILIATION, SOCIAL MOBILITY, AND THE PROBLEM OF CAUSALITY: A METHODOLOGICAL CRITIQUE OF CATHOLIC-PROTESTANT SOCIOECONOMIC ACHIEVEMENT STUDIES

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Abstract

Although studies addressed to the effects of Catholic and Protestant affiliation upon socioeconomic achievement have been proliferous, there is great disparity in their theoretical conclusions. In this paper¹ we argue that this disparity is in great measure due both to the heterogeneous methodologies employed, and a general lack of clarity concerning assumed causal models. Statistical support for this assertion is supplied by a demonstration of the strong relationship that exists between the type of methodology used and the eventual conclusions drawn. It is proposed that an adequate study of the problem requires a clear conception of the causal processes involved.

From the time that Talcott Parsons translated and introduced Max Weber's *The Protestant Ethic and the Spirit of Capitalism* to the academic community in the United States, the American sociologist has been intrigued by the implications of the Weberian hypothesis. One derivative of this intrigue has been a growing polemic concerning the effect of Catholic and Protestant religious affiliation upon socioeconomic achievement. According to Mack et al. (1956: 295-296), the central unanswered question ". . . is whether the Catholic and Protestant faiths in contemporary American society exert a potent enough influence on behavior to be accurately designated 'directives.'" In recent decades, a host of empirical studies have sought to give answers to this question, but a comparison of their conclusions reveals a striking dearth of consensus.

The object of this study will be to bring some clarity into the debate

through a critical reanalysis of a number of research studies. It should be noted that we have no intention of taking an advocacy position on either side of the dispute, but are interested, rather, in offering a methodological critique. Our discussion will be guided by two over-riding aims: 1) To demonstrate (with empirical evidence) that particular conclusions on this issue are highly associated with controls (or lack thereof) for particular independent variables, and also 2) to argue that without explicit statements about the substantive processes governing socioeconomic achievement (thereby delimiting appropriate controls) research in this area cannot hope to come to consistent substantive conclusions.

To understand our approach, the reader must keep two points in mind. First, some authors have argued that the Protestant-Catholic breakdown does not reflect the intent of Weber's theory

and should, therefore, be abandoned. In this paper we are not concerned with, and earnestly wish to remain aloof from, this theoretical argument. Regardless of whether or not such a procedure is an adequate operationalization of Weber's ideas, the question of Protestant-Catholic differences in socioeconomic achievement is one which researchers have been pursuing for some time. As long as research continues to be generated on this topic, we feel compelled to comment on some of the methodological problems involved in such a project. Second, this study is not, and should not be interpreted as, a comprehensive review of the literature involving "Protestant Ethic" research (for such a review, see Bouma, 1973). We have purposively selected a number of studies which are comparable on particular factors, such as the inclusion of certain variables, controls, and dependent variables. Thus, many significant works in this area are not included in our study. Our primary objective is to critique past research in an effort to offer some constructive suggestions for future research, and not to provide an overall theoretical assessment.

PROCEDURE

Table 1 lists those studies which will be included in our analysis. While these studies were selected for a number of reasons, the following criteria were considered essential: In each case 1) the major independent variable was operationalized through a comparison of Catholic and Protestant religious groups, 2) the dependent variable involved the measurement of socioeconomic achievement at the individual level, and 3) there was an effort to add rigor to the

analysis through the introduction of controls. Also in Table 1, the studies are differentiated according to the controls employed by the authors and whether they concluded that there was a Protestant advantage in socioeconomic achievement (P-A) or whether there was no significant difference (N-D) between them.² Before attempting to interpret this table, however, it will be necessary to offer a brief explanation of the significance of each potential control relative to the process of social mobility.

The researcher is, of course, interested in controlling for those factors which he believes directly affect an individual's chances of socioeconomic achievement, and for which lack of control could easily confound the problematic relationship. A respondent's father's occupation, for example, would greatly affect his chances for social mobility since a high status father is much more likely to have high status offspring than is a low status father. Similarly, one's ethnic and racial origins may affect life chances in the United States if for no other reason than that certain occupations are racially and ethnically restricted. By "generation" we mean the generation of immigration. It is assumed that a third or fourth generation citizen will not be exposed to the same employment disadvantages that accrue to first generation immigrants. It is also important that the age of the respondent be taken into consideration since the older subject is more likely to have attained a high status occupation than the younger subject (who is just entering the labor market). "Region reared," "region of present residence," "community size reared," and "community size

TABLE 1
STUDIES CATEGORIZED ACCORDING TO CONTROLS USED AND PROTESTANT-ADVANTAGE (P-A)/No-Difference (N-D) CONCLUSIONS

<i>Studies</i>	<i>Father's Occupation</i>	<i>Ethnicity</i>	<i>Generation of Immigration</i>	<i>Age</i>	<i>Race</i>	<i>Region Reared</i>	<i>Region of Present Residence</i>	<i>Community Size Reared</i>	<i>Community Size of Present Residence</i>	<i>Education</i>	<i>Conclusion</i>
Organic (63)	x	x		x	x	x					P-A
Lenski (63)	x				x						P-A
Mayer & Sharp (62)		x	x		x	x		x			P-A
Weller (63)	x	x		x	x	x		x			P-A
Jackson et al. (70)	x	x	x	x	x	x		x			P-A
Greeley (64)				x			x				N-D
Burchinal & Kenkel (62)					x		x				N-D
Lipset & Bendix (59)	x		x		x						N-D
Mack et al. (56)	x			x	x						N-D
Glenn & Hyland (67)*				x	x		x		x		N-D
Gockel (69)					x		x		x	x	N-D
Goldstein (69)				x	x		x			x	N-D
Schuman (71)	x				x						N-D

*Glenn and Hyland's results are difficult to interpret in terms of our P-A/N-A differentiation. On the one hand, using percentage breakdowns, their data show a slight Protestant advantage, due almost totally to a greater representation of Protestants in professional occupations. On the other hand, in non-manual, upper-manual and lower-manual occupations there were no differences between them. Furthermore, while Protestants were more highly represented at the higher income levels, they were also more highly represented at lower income levels. Thus, below middle income levels, Catholics were actually better off as a group. The authors themselves conclude that since World War II "Catholics have gained dramatically and have surpassed Protestants in most aspects of status. . . . Our findings are consonant with the belief . . . that religious influences do not handicap Catholics in their competition with Protestants."

of present residence" are all potentially significant controls inasmuch as chances of mobility are highly correlated with population density and regional considerations. Finally, if our interest is in the "direct" effect of religious affiliation upon occupational attainment, then we need to control for educational achievement since education is one of the chief means of socioeconomic advancement in our society.

Even a cursory analysis of Table 1 reveals that there is a strong relationship between the types of controls introduced in a study and the conclusion reached by the author (Protestant ad-

vantage or no difference). Table II helps us further understand the situation by breaking down each control-conclusion relationship into four-cell contingency tables. To the extreme right of each four-cell frequency distribution we have given the Fisher's Exact P-value which is the probability of getting the observed frequencies under a null hypothesis that there are no differences in the population proportions.³

A number of things become clear in Table 2. First, controls for age (P=.587) seem to have little effect upon a study's P-A/N-D conclusions. Second, since all but one study controlled for

TABLE 2
STUDIES CATEGORIZED ACCORDING TO THEIR USE OF CONTROLS AND
PROTESTANT-ADVANTAGE/NO-DIFFERENCE CONCLUSIONS*

<i>Variables</i>		<i>Conclusions</i>		<i>Fisher's P-Value</i>
		<i>P-A</i>	<i>N-D</i>	
Father's Occupation	controlled	4	3	.179
	not controlled	1	5	
Ethnicity	controlled	4	0	.007
	not controlled	1	8	
Generation	controlled	2	1	.315
	not controlled	3	7	
Age	controlled	3	4	.587
	not controlled	2	4	
Race	controlled	5	7	.615
	not controlled	0	1	
Region Reared	controlled	4	0	.007
	not controlled	1	8	
Region: Present Residence	controlled	0	5	.044
	not controlled	5	3	
Community Size: Present Residence	controlled	0	2	.359
	not controlled	5	6	
Community Size: Reared	controlled	3	0	.035
	not controlled	2	8	
Education	controlled	0	2	.359
	not controlled	5	6	

*Based upon an N of 13 studies

race ($P=.615$), it too fails to differentiate between P-A and N-D conclusions. Third, controls for generation ($P=.315$), community size of present residence ($P=.359$), father's occupation ($P=.179$) and education ($P=.359$) are moderately strong differentiators; fourth, ethnicity ($P=.007$), region reared ($P=.007$), region of present residence ($P=.044$) and community size reared ($P=.035$) are variables whose control (or lack of control) is strongly related to a study's P-A/N-D conclusions. Specifically, if father's occupation, ethnicity, generation, region and community size reared are controlled for, one is likely to reach a "Protestant-advantage" conclusion, while if they are not controlled, the opposite conclusion

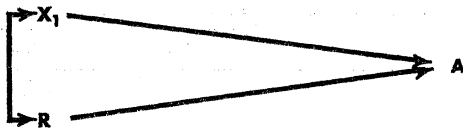
of "no difference" is highly probable. On the other hand, if region of present residence, community size of present residence or education are controlled, most studies conclude "no difference," while if they are not controlled, a "Protestant-advantage" conclusion is likely.

DISCUSSION

One's first reaction to these findings (above) may be that they are merely chance-accident statistical occurrences. If a causal model approach is applied to the problem of socioeconomic achievement and religious affiliation, however, these findings become meaningful and eminently logical.

First, we need to distinguish between three potential causal models of the re-

FIGURE A
(Model I)



relationship under study. In Figure A (Model I), religious affiliation (R) is hypothesized to be a direct determinant of socioeconomic achievement (A). This model implies that, regardless of other effects (X_1), one's socioeconomic achievement is, at least in part, dependent upon one's religious commitment. Model II (Figure B) acquaints us with the possibility that the hypothetical relationship between religious affiliation and socioeconomic achievement could be spurious. The supposition here is that both of these variables are similarly affected by a third variable(s), thereby accounting for the concomitant fluctuations of both R and A. In this case, there would be no substantive relationship between religious affiliation and socioeconomic achievement. The third causal model (Figure C) asserts that the relationship in question is substantively valid, but mediated by a third variable(s). It is assumed here that religious affiliation causes X_1 to occur,

which in turn stimulates socioeconomic achievement. The difference between Models II and III is that in Model III, X_1 is a direct cause of the variation in both R and A.

In each of the studies cited, the authors were properly concerned with the effects of X_1 variables on the socioeconomic achievement relationship. For that reason each author introduced controls for those X_1 variables which he felt might confound the relationship. The difficulty with this procedure, however, is that without explicit statements concerning assumed causal models, the results of such an analysis can be easily misinterpreted. For example, suppose the researcher found that upon controlling for certain X_1 variables, the correlation between religious affiliation and socioeconomic achievement was eliminated, as found by Gockel (1969), and Goldstein (1969). One might wish to conclude on this basis that religious affiliation does not affect socioeconomic achievement. Such a conclusion, however, assumes that the spurious model (II) reflects the real world. In fact, such findings imply *only* that Model I can be rejected; they provide no information that would allow the researcher to choose between Models II and III, because in each case the researcher would expect the R-A relationship to wash out when X_1 variables are controlled.

We have constructed a hypothetical causal model of socioeconomic achievement (Figure D) in an effort to dis-

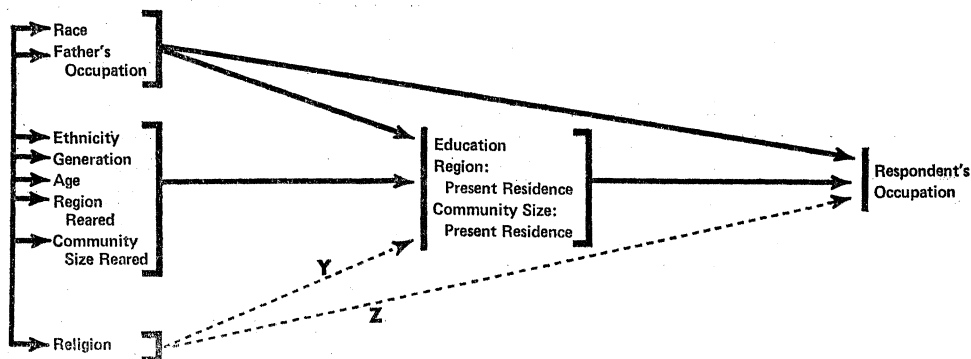
FIGURE B
(Model II)



FIGURE C
(Model III)



FIGURE D
(Model IV)
Hypothesized Causal Model



cover why some studies (introducing certain controls) have reached one conclusion, while others (using different controls) have reached quite another. This model is based upon our interpretation of available research and theory and, as such, will require a degree of explanation. Before doing this, however, we should make a few preliminary remarks. Note first of all, that we have chosen "respondent's occupation" as our dependent variable. This method of operationalizing socioeconomic achievement merely reflects a (somewhat arbitrary) preference on our part and should not be interpreted as essential to such a model. Furthermore, since it is the effect of religion that specifically interests us, we need to construct our model in such a manner that only those variables which operate concomitantly with religion are included as exogenous variables. Those variables which are sequentially subsequent to religion, but prior to occupational attainment, are endogenous variables.

The endogenous variables in our model are education, region of present residence, and community size of present

residence. These variables represent the "means" by which we believe most people achieve occupational mobility. Education, of course, has long been recognized, not only as a means, but as a requirement for status improvement in industrial societies. The high correlation between educational achievement and occupational placement is fairly well documented (cf. Blau and Duncan, 1967:169-170). We believe that region and community size (of present residence) operate in a similar, if less obvious manner. It is true that certain geographical areas in the United States have a preponderance of particular types of occupations, then we must assume that for many people upward or downward mobility will necessitate geographical mobility. Blau and Duncan (1967:272), furthermore, report that "occupational opportunities improve as the size of place increases." This means that upward mobility for much of the rural population is dependent upon migration to urban areas. If our model is correct, these endogenous variables mediate (but do not negate) the relationship of the exogenous and depen-

dent variables. Failure to understand this process could result in grievous interpretive errors.

The literature clearly indicates that two variables, race and father's occupation, have both direct and indirect effects upon occupational mobility. Blau and Duncan (1967:238) report that even when differences in education, region, first occupation and social origins are "statistically standardized and we examine how Negroes would fare if they did not differ from whites in these respects, their occupational chances are inferior to those of whites." Race, therefore, not only delimits educational opportunities, it also directly affects one's chances of occupational mobility throughout one's lifetime. The influence of father's occupation is similar. Its greatest impact upon occupational placement rests in its ability to shape educational achievement. However, long after one's educational career has ended, father's occupation exerts pressures that measurably influence one's occupational mobility (cf. Blau and Duncan, 1967: 170).

According to our model, five variables operate concomitantly with religion by indirectly affecting occupational placement. These variables are ethnicity, generation of immigration, age, region reared and community size reared, and they are assumed to have no "direct" effect upon occupational mobility. Available evidence seems to indicate that (1) some ethnic groups may experience greater difficulty than others in occupational mobility (Blau and Duncan, 1965:4-24); (2) first generation immigrants compete under cultural background constraints from which others are usually free (Abrahamson, et al.,

1976:251-258); (3) the occupational experiences of different age cohorts are often quite varied (Lipset and Bendix, 1967:34, 173-174; Slocum, 1974:152-154); (4) regional factors may differentially impinge upon an individual's occupation attainment (Slocum, 1974: 212-217); and (5) population density is positively correlated with occupational success (Blau and Duncan, 1965:4-24). However, the effect of these variables on occupation placement is mediated by the endogenous variables in our model. That is, our model predicts that the influence of these variables on occupational achievement is based upon their determining effects on education, region of present residence, and community size of present residence.

Finally, our model allows for the possibility that religious affiliation may either directly affect occupational achievement (line Z) and/or indirectly affect the dependent variable through its effects upon the intervening variables (line Y). (Since the effects of religious affiliation are of major interest to us, they have been designated by dotted lines.)

Let us now go back to our findings with regard to the relationship between controls employed and conclusions reached, and review them in terms of our hypothesized causal model. First, we found that if region of present residence, community size of present residence, and education were controlled, the study was likely to reach a "no-difference" conclusion. This makes a great deal of sense, relative to our model (Figure D), because these are precisely those factors which serve as the *means* to occupational mobility. This finding also indicates that religion is

probably not a direct determinant of socioeconomic achievement (thus Model I can probably be rejected, as well as line Z on Model IV). This does not mean, however, that religion is ineffective in its relationship to respondent's occupation because it is quite possible that religious affiliation may influence occupational achievement indirectly by encouraging/discouraging the individual to pursue more education or to change his place of residence. In short, if direct effects (line Z) are eliminated by controls for mediating variables, then the key question becomes: what is the relationship between religious affiliation and the mediating variables when controls are introduced for relevant exogenous variables? This is a question, however, which these studies have not addressed (cf. Featherman, 1971).

Our other major finding was that, when father's occupation, ethnicity, generation, region and community size reared were controlled, the studies were likely to conclude that there was a Protestant advantage in socioeconomic achievement. This finding also makes sense in terms of our hypothesized causal model, although it does not tell us quite as much about the substantive processes involved. Remember that if there is no direct relationship between R and A (Model I), then the two remaining possibilities are that R and A are caused by some third variable(s) (Model II), or that R affects A through intervening variables (Model III). If we look at our hypothesized causal model (Figure D), we can see that those studies which controlled for exogenous variables but not for endogenous variables were likely to reach a "Protestant advantage" conclusion. *If*

our model is correct,⁴ then such a finding would cast doubt on the credibility of the spurious model, because the only variables which could affect religion and respondent's occupation at the same time are the exogenous variables. Theoretically, this *may* offer inferential support to those who claim that there is a Protestant socioeconomic achievement advantage and who base their argument on the effects of Protestant affiliation on mediating variables. At this point, however, such an hypothesis remains pure conjecture because none of these studies demonstrably prove such a relationship. Furthermore, because most of the P-A conclusions were based on 1) a limited population (ah, the wonders of Detroit data!), and 2) very small actual differences between Protestant and Catholic groups, the results remain highly inconclusive.

CONCLUSION

Most students of religion and social mobility would agree that research in this area is plagued by a number of problems. Evidence of this abounds, but is most clearly shown by the lack of consensus in research conclusions. In this paper we have argued that a major source of this dissension stems from the inconsistent methodologies employed by researchers. This has been demonstrated by the finding that conclusions reached in past studies are highly correlated with the types of variable-controls used. Furthermore, by placing the problem within the context of a causal model approach, we have seen that this relationship between controls and conclusions is not serendipitous, but is the logical consequence of the substantive effects of the independent variables. It is imperative, therefore,

that future research efforts begin with explicit statements concerning causal assumptions (such as the causal model we have hypothesized), and then ground their analyses and conclusions in the

framework of their assumptions. Only then will we begin to meaningfully interpret available empirical data, much less understand the substantive processes which they reflect.

NOTES AND REFERENCES

1. An earlier version of this report was presented at the annual meeting of the Society for the Scientific Study of Religion, October 24-26, 1975, in Milwaukee, Wisconsin. I am grateful to Leo C. Rigsby for his comments and criticisms on a previous draft of this paper.
 2. Although a few of these studies actually did indicate a slight Catholic advantage, the findings were not statistically significant and for our purposes could be placed under the "no-difference" (N-D) category.
 3. It should be noted that the Fisher's Exact P-value assumes simple random sampling, an assumption which is violated in our analysis. The statistic is, nevertheless, useful in this case as a relatively conservative basis for analytical decision making.
 4. If one could demonstrate, however, that the endogenous variables are actually independent variables which *cause* changes in religious affiliation (between Protestant and Catholic groups), then the spurious model is still a very real possibility. Our own feeling is that, while changes in education and place of residence often precipitate changes in church membership, they rarely induce one to change one's membership from a Protestant to a Catholic group, or from a Catholic to a Protestant group. Thus, at least with the variables included in our study, the spurious model is unlikely.
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