Rateable Value as a Historical Measure of Socio-Economic Status.

T.H.C. Stevenson's classification of occupations into social class categories in 1913 has had a major influence on demographic, sociological and epidemiological research in Great Britain since its inception. As Simon Szreter wrote in 1984, 'As well as it's being common currency among empirical sociologists researching contemporary issues, it has achieved something of an ascendancy amongst social historians of modern Britain, too ... [it] has been projected both forward and backwards in time, upto seventy years in each direction from its date of inception, 1913.'[1]

Stevenson mainly relied on perceived skill levels for his system of classification, consistent with his belief about the importance of cultural knowledge in shaping patterns of mortality and fertility.[2] In discussing the role of income, he wrote:

> its drawback is that it may fail altogether as an index of culture, probably the more important influence. The power of culture to exert a favourable influence on mortality, even in the complete absence of wealth, is well illustrated by the case of the clergy. The income test, if it could be applied, would certainly place them well down the list, yet their mortality is remarkably low ... the lower mortality of the wealthier classes depends less upon wealth itself than upon culture, extending to matters of hygiene ... poverty [is] much more closely associated with low social status than wealth with its opposite.[3]

This implies that culture was more important for the wealthy and income for the poor, which is perhaps why he somewhat ambivalently concluded that although social position was 'largely but by no means exclusively a matter of wealth or poverty, culture also [has] to be taken into account', and that 'any scheme of social classification should take account of culture as well as of wealth.'[4]

This ambivalence was reflected in the classification of clerks, who were placed in Social Class 1 in 1911, whereas the artisan was classified in a lower social class, 'even though his wage may be higher than the clerk's.'[5] In 1921 clerks were demoted to Class 2 and by 1931 were relegated even further to Class 3. This suggests a degree of confusion and ambiguity in the system of categorisation, one of many, due to the lack of a clear system of classification. Stevenson presented evidence in 1923 to show that clerks had a higher infant mortality rate than other groups in Social Class 1, and this presumably was one of the reasons why he re-classified them into Social Class 2 in 1921.[6] This in effect created a self-defining system, with adjustments made to social class of class and mortality variables.

Using infant and other forms of mortality as an indication of poverty is historically

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[1] S. Szreter, 'The genesis of the Registrar-General's social classification of occupations', *British Journal of Sociology,* 35, No. 4 (1984).

[2] T.H.C. Stevenson, 'The vital statistics of wealth and poverty', *Journal of the Royal Statistical Society,* 91 (1928), pp. 207-230. Stevenson relied primarily on infant mortality rates to assess his classifications of occupations.

[3] Ibid, pp. 209, 214.

[4] Ibid, pp. 210,214.

[5] General Register Office, *Census of England and Wales, 1911,* Volume 10, Occupation and Industries,Part 2 (HMSO, 1913), p. xii.

[6] T.H.C. Stevenson, 'The social distribution of mortality from different causes', *Biometrika,* 15 (1923), p. 386.

questionable. There is evidence for example that mortality was higher in the 1840s in wealthy districts of London than poorer areas.[7] Rateable value was used by the Registrar General to measure the relative poverty and wealth of registration districts in the city, with the poorest East End districts having much lower mean rateable values than the prosperous West End. A similar pattern is to be found in Registrar General's statistics for the 1880s.

Table 1: Mortality Rates per 1000 in London Registration Districts, 1881-1890.[8]

Registration District	*Mean Rateable Value (£), 1891*	*Mortality Rates*			
		Infant Mortality Rate	*Under Five Years*	*25-34 Years*	*35-44 Years*
Bethnal Green	23.0	157	76	8.6	14
Mile End	25,3	146	69	6.4	12
Camberwell	26,2	143	60	6.6	12
Poplar	27.8	148	68	8.9	15
Greenwich	29.4	147	66	9.0	13
Fulham	29,8	161	68	6.3	10
St, Georges in the East	32,3	182	88	9.6	16
Hackney	32.4	137	60	7.1	11
Lambeth	34.8	145	67	7.8	13
Lewisham	36.7	121	45	4.5	8
Mean Average	**29.8**	**148.7**	**66.7**	**7.5**	**12.4**
Shoreditch	36.9	168	78	78	13
Whitechapel	38.1	173	85	17.2	29
Islington	39.5	144	61	6.6	11
Wandsworth	39.5	141	57	6.3	9
Chelsea	49.3	160	74	8.6	15
St. Pancras	49.6	153	67	8.6	15
Holborn	49.7	164	82	6.8	11
Marylebone	66.5	148	75	6.8	12
St. Saviour's	70.7	166	79	7.1	12
Mean Average	**48.9**	**157.4**	**73.1**	**8.3**	**14.1**
Westminster	70.7	163	72	6.9	14
Kensington	73.3	154	63	6.6	12
Hampstead	73.5	117	49	5.4	9
St. Olave's	81.2	156	73	11	17
Paddington	83.5	143	62.9	6.3	11
St. Giles	87.6	154	80	6.5	13
Strand	88.7	226	110	13.7	25
City	136	171	90	20.6	33
St. George's Hanover Square	141.6	153	71	8.6	16
Mean Average	**92.9**	**159.7**	**74.6**	**9.5**	**15.7**

[7] See P. Razzell, *Population and Disease: Transforming English Society, 1550-1850* (London, 2007), pp. 136, 137.
[8] *Registrar-General's Decennial Supplement, 1891*.

This table indicates that mean rateable value accurately measures the relative poverty and wealth of London's registration districts, with poor East End areas having significantly lower values than the wealthy West End districts. As with the findings for the 1840s, the poorer districts had lower mortality rates on average than the wealthy areas, and this was probably a function of 'the hazards of wealth' – an excessive consumption by the wealthy of alcohol, tobacco and food, along with a relative lack of exercise.[9] The association between poverty and infant mortality was historically variable,[10] and so Stevenson's reliance on infant and other forms of mortality to classify occupations is therefore questionable. His difficulty was the lack of independent and objective evidence with which to construct his system of class classification. He appears to have fallen back on current notions of the status and poverty/wealth of particular occupations, and where these were at the extremes – such as professionals contrasted with labourers – there were no great difficulties. It was the large majority of intermediate occupations that created major problems – including the swollen Class 3 category which constituted about a half of the total population – with the allocation of particular occupations to specific class categories appearing arbitrary and ambiguous.

There was also the problem of occupations which were strongly associated with particular geographical locations, such as agricultural labourers, where their rural environment strongly influenced mortality patterns independent of their level of poverty. Agricultural labourers were amongst the poorest occupational groups in England, and yet their levels of infant and adult mortality were some of the lowest in the country.[11] Likewise, miners were a relatively well-paid occupational group, and yet had a high level of infant mortality.[12] It was perhaps for these reasons that Stevenson constructed in 1913 special class categories for these two occupational groups, but in doing so, created further ambiguity and a lack of clarity.

Stevenson's 1913 classification of social class did not use employment status, whereas the subsequent 1921 system of categorisation did include such information. Although the new system expanded the number of occupational categories – from 373 in 1911 to 989 in 1921 – the former is in certain respects more appropriate for some forms of research, as it relies on occupational description without details of employment status. Occupation data has been used widely in census reports, but as has been pointed out, 'little empirical evidence exists to support the claim that census groupings by occupation were homogenous with regard to social standing.'[13]

However, in spite of its almost universal use, Stevenson's system of classification has attracted widespread criticism. It was finally replaced in 2001 by the new O.N.S. system of classification, *National Statistics Socio-Economic Classification* [NS-SEC]. The lead authors of the new system, David Rose and David Pevalin, have summarised the reasons for its replacement as follows: 'The limitations of SC [Social Class Based on Occupation], which remained almost unchanged from 1921 until its demise, are legion. It has been correctly described as

[9] See P. Razzell and C. Spence, 'The hazards of wealth' in P. Razzell, *Essays in Historical Sociology*, 2021. See also Razzell, *Essays*, pp. 169, 196. 200. 250. 260, 261, 264 for evidence of higher mortality amongst the wealthy.
[10] P. Razzell, *Mortality, Marriage and Population growth in England, 1550-1850*, 2016, pp. 37-41.
[11] Haines, 'Socio-economic differentials', p. 313.
[12] Ibid.
[13] Nottingham Elites and Civil Society 1900-1950: Status, Engagement and Lifestyle, Online https://Nottingham-elites.org.uk/housing.php, p. 4.

an intuitive or a priori scale. A plethora of articles and book chapters have appeared in the last twenty years calling attention to its problems'[14]

The NS-SEC system attempts to resolve these difficulties by re-classifying occupations. It requires the identification of a 'household reference person' – and 'that person's [occupational] position to stand for the whole household.' The reference person is 'responsible for owning or renting' the household, and in the case of joint householders, 'the person with the highest income takes precedence.'[15] This means that information on the income of two or more household members is not included in the final socio-economic classification of occupations, and with the historical growth of women's employment, this is a serious flaw in the new system. It also suffers from the fact that most historical datasets, including birth, marriage and death certificates, parish registers, vaccination birth registers, valuation rolls and other datasets, do not have information on employment conditions. All these latter sources are used widely by social historians and others.

One potential way around this difficulty is to establish the economic value of residential properties, reflecting the income and economic statusof all members of the household. This shifts the analysis of socio-economic classification away from employment relations to ranking by household economic value. The NS-SEC is a non-hierarchical categorical scheme with a set number of social classes defined by qualitative employment relations,[16] whereas the linking of occupations to household economic value represents a quantitative hierarchical continuous system. Continuous schemes of classification allow an indefinite number of socio-economic categories.

Rateable value is a numerical measure of household economic value, and was levied universally in all areas of England, Scotland, Wales and Northern Ireland. It was based on an assessment of the annual rent of an individual property. Evidence exists to show a significant association between rateable value and subjectively defined social class. Research on the town of Nottingham found the following link:

Table 2: Rateable Value and Subjectively Defined Social Class in Nottingham, 1900-50.[17]

	Upper-Middle Class	Middle-Middle Class	Lower-Middle Class	Skilled Working Class
Mean Rateable Value(£)	103	48	19	11

A study of Glasgow examined the association between rateable value and occupational class, using Stevenson's 1913 classification of occupations.

Table 3: Rateable Value and Social Class Classification of Occupations in Glasgow, 1911.[18]

Social Class (Stevenson 1911)	Number of Occupations	Mean Rateable Value (£)

[14] D. Rose and D.J. Pevalin, *A Researcher's Guide to the National Statistics Socio-economic Classification* (London, 2003), pp. 1, 2.
[15] *The National Statistics Socio-economic classification (NS-SEC)*, Office of National Statistics.
[16] Ibid
[17] Ibid, p. 5.
[18] Only occupations with fifty or more cases were included in the analysis. The figures are based on data on occupations and rateable value in the Glasgow 1911 Land Duty Survey. It was possible to code only 135 of the total of 252 occupations into social class categories – 53.6% – and this was because of the ambiguity of the descriptions of occupations both in the Land Duty Survey and Stevenson's classification of occupations.

Class 1	25	36.0
Class 2	22	21.4
Class 3	57	12.1
Class 4	21	11.5
Class 5	10	9.1

The association between household economic value and social class is linear in both the above tables, indicating that rateable value is a significant measure of socio-economic status. It is possible to assess the status of individual occupations by measuring the average rateable value of these occupations. This provides an objective quantitative assessment which Stevenson lacked when he was compiling his 1913 social class classification. The Land Duty Survey for the whole of Great Britain was carried out by the Inland Revenue in 1911, and provided information on both occupation and rateable value of addresses, running parallel to the 1911 Census. This will allow analysis of local and regional variations, as well as compiling an overall national classification of social classes.

Historically, rateable value was a numerical measure of the market value of a property, and is therefore particularly suitable for the measurement of household economic status. Research carried out by J.R. and U.K. Hicks on the incidence of local rates in Great Britain in 1937 and 1938 included data on the relationship between average household expenditure per head and gross rents/ rateable value. Figures are available for gross rents and rateable value for the North of England, and gross rents for Scotland as follows:

Table 4: Household Expenditure and Rents/ Rateable Value in the North of England and Scotland, 1937, 1938.[19].

Households With Average Expenditure per Head per Week Of	*North of England*		*Scotland*
	Gross Rents	Rateable Value	Gross Rents
Under 10 Shillings	£22.5	£6.4	£16.5
10 Shillings but Under 20 Shillings	£23.6	£6.7	£19.9
20 Shillings but Under 30 Shillings	£26.9	£7.6	£22.5
30 Shillings and Over	£30.2	£8.6	£24.9

There is a linear relationship between household expenditure and gross rents/ rateable value in the North of England and Scotland, although the association appears to be stronger in the latter than the former. There is little data on the direct relationship between income and household economic value, but a household survey carried out in the United Kingdom in 1966 included information on gross family income and average gross rent – which is directly related to rateable value – as follows.

Table 5: Gross Family Income and Average Gross Rent in the United Kingdom. 1966.[20]

Average Income Per Week	*Number of Households*	*Average Rent in Shillings per Week*

[19] J.R. Hicks and U.K. Hicks, *The Incidence of Local Rates in Great Britain* (Cambridge 1945), p. 25.
[20] *Family Expenditure Survey Report,* HMSO 1961.

Under £3	143	24.31
£3-to under £6	285	32.65
£6 to under £8	323	40.89
£8 to under £10	416	43.01
£10 to under £14	521	46.33
£14 to under £20	478	50.15
£20 to under £30	572	59.50
£30 to under £50	272	56.46
£50+	264	95.10

There is a strong linear relationship between gross family income and average weekly rent – approximately quadrupling between the lower and higher income categories. There are similar correlations for York in 1901, and Bristol in 1937.[21]

Although rateable value is not a direct measure of income, it has advantages over data which relies primarily on pay and income for individual occupations, as it reflects total family income and wealth, as well as lifestyle. Nick Hayes in a review of rateable value and other measures of status has concluded that

> the house ... was the most visible social guide to a family's level of income; moving house – 'up' or 'down' – the surest indicator of changing aspiration or financial circumstance, and for most the single most important expression of their position in society. For the historian, housing offers a common, attenuated spine around which status was woven, a means by which both 'objective' class and 'subjective' status can be jointly valued and assessed ... Economic valuations (being based on nominal rents) took into account ... physical appearance ... embellishment beyond cost, as well as the size of the house and its area location (salubriousness, amenities) – and around the totality of which individual and family 'lifestyle' was located and fixed.[22]

This quote indicates that rateable value is a measure of cultural identity as well as economic status, confirmed by the claim that 'families brought with them specific sets of cultural values ... not simply between classes but within (between "rough" and "respectable" for example), where quality of housing stood as a reasonable proxy for the neighbourhood's "general sense of wellbeing" and income level.'[23] Given the importance of cultural values for calculating socio-economic status, the association between economic household value and culture as well as income, makes it an invaluable measure of status.

Hayes has presented evidence on probate and economic household value for a sample of 459 people in Nottingham during 1934, and the following table indicates that there was a linear relationship between wealth and rateable value.

Table 6: Probate Levels and Median Rateable Value in Nottingham, 1934.[24]

[21] B. Seebohm Rowntree, *Poverty: A Study of Town Life*, 1901, p. 165; A.W.T. Ellis, 'Rents, rates and incomes in Bristol, 1937', *Review of Economic Studies,* 11, 2 (1944), p. 104.
[22] N. Hayes, 'Calculating class: housing, lifestyle and status in the provincial English city, 1900- 1950', *Urban History,* 26, 1 (2009), pp.123, 125.
[23] Nottingham Elites, op.cit., pp. 2, 3.
[24] Hayes, op. cit., p. 132.

Probate Levels	*Median Rateable Value*
£1-£900	£23
£1,000-£1,999	£32
£2,000-£4,999	£52
£5,000-£9,999	£66
£10,000-£24,999	£72
£25,000-£49,999	£88
£50,000-£99,999	£109
Over £100,000	£145

One of the main advantages of household economic value is that it constitutes an ordinal scale running from very low to high values, allowing a detailed breakdown across a complete range of measures, and providing an objective and independent quantitative measure for assessing socio-economic status. It is important to have data for individual cities and towns, as rateable values varied from place to place,[25] so that it is the comparisons between different individuals and groups within communities that will generate most appropriate relative measures of status.

An illustration of the classification of occupation is to be found in the example of Glasgow in 1911, using the Land Duty Survey for that period, and giving information on occupation and rateable value. The following table focuses on the categories of social classes 1, 2, 4 and 5.yields the following results.

Table 7: The 1911 Valuation Duty Survey of Glasgow.

Occupation	*Number of Cases*	*Mean Rateable Value (£)*	*Social Class (Stevenson)*
Chartered Accountant	75	70.4	1
Merchant	288	67.9	1
Wine Merchant	73	63.4	1
Physician	273	61.8	1
Surgeon	166	61.6	1
Clergyman	315	50.7	1
Architect	81	41.5	1
Accountant	117	41.1	1
Spirit Merchant	174	37.0	1
Builder	119	36.0	1
Journalist	66	33.4	1
Dentist	122	32.9	1
Schoolmaster	59	32.3	1
Artist	53	28.9	1
Bank Clerk	66	26.5	1
Commercial Traveller	74	26.5	1
Manager	706	26.4	1
Buyer	74	26.3	1
Agent	330	26.1	1
Teacher	384	25.2	1
Chemist	208	25.0	1
Clerk	3,837	16.8	1

[25] Ibid, pp. 24, 25.

Insurance Agent	355	15.7	1
Broker	69	14.2	1
Salesman	2,004	13.1	1

Occupation	*Number of Cases*	*Mean Rateable Value (£)*	*Social Class (Stevenson)*
Writer	287	59.8	2
Clothier	168	30.4	2
Teacher Of Music	63	30.3	2
Pawnbroker	77	27.8	2
Ironmonger	168	25.6	2
Jeweller	159	25.0	2
Tobacconist	81	25.0	2
Stationer	282	23.8	2
Draper	510	20.7	2
Traveller	2,373	20.3	2
Book-keeper	260	19.8	2
Photographer	94	18.9	2
Dairyman	208	18.5	2
Grocer	946	18.1	2
Fruiterer	118	17.5	2
Butcher	801	15.2	2
Fishmonger	94	15.0	2
Engraver	128	13.8	2
Baker	1,537	13.2	2
Tailor	587	13.0	2
Dealer	285	10.3	2
Coal Dealer	114	9.8	2

Occupation	*Number of Cases*	*Mean Rateable Value (£)*	*Social Class (Stevenson)*
Warehouseman	1800	19.7	4
Miller	87	15.5	4
Steward	248	13.2	4
Attendant	72	12.7	4
Hairdresser	365	12.4	4
Postman	570	12.4	4
Caretaker	167	12.2	4
Cooper	399	11.9	4
Engine Driver	582	11.4	4
Gardener	236	11.3	4
Currier	94	11.2	4
Mechanic	500	10.7	4
Turner	285	10.6	4
Barman	52	10.4	4
Wood Turner	106	10.2	4
Ironworker	352	9.9	4
Soldier	50	9.8	4
Machinist	455	9.6	4
Railway Porter	75	9.5	4
Sawyer	328	9.2	4
Carter	297	8.5	4

Occupation	*Number of Cases*	*Mean Rateable Value*	*Social Class (Stevenson)*
Watchman	390	11.5	5
Brushmaker	87	11.0	5
Railway Servant	134	10.3	5
Cabman	122	9.3	5
Porter	746	9.3	5
Platelayer	69	8.7	5
Labourer	19,876	7.3	5
Hawker	111	6.8	5
Dyer	168	9.5	6
Miner	899	7.0	7

There is marked variation in rateable values both within and between social class categories, which indicates that a revision is necessary to establish an accurate social class classification. A repeat of this exercise for other cities, towns and rural areas will eventually` enable the creation of a reliable national social class system, suitable for social historical, demographic and epidemiological research.

An example of the use of rateable value is the study of child mortality in Hertfordshire in 1923-39.[26] The Hertfordshire Health Visitors Register was used by David Barker and colleagues for the development of their 'fetal origins' hypothesis, but their research lacked a measure of socio-economic status. The following table summarises an analysis of economic household value at birth and its association with measures of infant and child mortality in five Hertfordshire towns.

Table 8: Rateable Value and Infant and Child Mortality in Five Hertfordshire Towns, 1923-1939.[27]

Rateable Value	Number of Live Births	Infant Mortality Rate per 1000	Number of Children (1-4) at Risk	Child Mortality Rate per 1000
£3-5	1341	48	1203	22
£7-10	3683	44	3401	17
£11-14	2137	41	1826	13
£15-18	843	43	702	13
£19-22	493	29	427	14
£23+	808	24	681	12

Although not perfectly linear, the table reveals that there was a significant association between household economic value and infant and child mortality. Rateable value is a numerical measure which is invaluable as research tool for future research, not requiring interpretative coding and providing a continuous gradient for the measurement of socio-economic status, and is historically available for most districts in the nineteenth and twentieth centuries in all areas of the United Kingdom.[28]

[26] P, Razzell, C. Spence, K. Vines, 'Poverty, birth weight and infant weight gain in Hertfordshire, 1923-1939', *International Journal of Epidemiology,* 33 (December 2004), pp. 1228-1233.

[27] The five towns are Hertford, Hitchin, Berkhampstead, Hoddesdon and Bishops Stortford. For some of the data included in this Table see Razzell, Spence, Vines, op.cit.

[28] Rateable Value was abolished in 1993 and replaced by Council Tax, with valuations running in eight bands from £40,000 to £320,000. This should allow future researchwhich uses data from these tax bands.