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Moving up, reaching back: How family ties shape upward mobility

Is upward mobility a solo journey – with career success driven by talent and hard work? Or is it a relational process, shaped by enduring connections to one's class and family origins? Malik Fercovic investigates, drawing on 60 in-depth interviews with Chilean professionals in law, medicine, and engineering.

Upward mobility is often celebrated as a triumph of talent and hard work: a student from a working-class background earns a university degree, secures a professional job, and eventually climbs into the middle (or even upper) class. But this story is incomplete. Most people who managed to move up the social ladder receive support from their families. And crucially, most also provide substantial financial, emotional, and practical support to their families of origin.

Examples from around the world show this is a widespread phenomenon. In India, sociologist Jules Naudet **documents** how upwardly mobile individuals maintain ties with family and community even as they cross class boundaries. In South Africa, the so-called “**black tax**” highlights the expectation that upwardly mobile professionals support both immediate and extended kin. In France, acclaimed writers such as **Annie Ernaux**, **Didier Eribon**, and **Édouard Louis** place family obligations at the heart of autobiographical accounts of social mobility.

These cases suggest that moving up is rarely an individual journey. Instead, upward mobility is a *relational process*, shaped by enduring connections to one's class and family origins.

Career success and family ties: The missing Latin American experience

Latin America has received comparatively little attention in research on upward mobility. Yet the region combines **high inequality**, weak welfare systems, and strong familistic norms – cultural expectations that emphasize loyalty and obligation toward kin.

Chile provides a clear example. In recent decades, expanded access to higher education and professional jobs has enabled significant upward mobility. Yet inequality remains deep, the welfare state is limited, and expectations of family solidarity are high. Rapid population ageing adds further pressures, as middle-aged professionals are increasingly called upon to support not only their nuclear families but also parents and other relatives.

Drawing on 60 in-depth interviews with Chilean professionals in law, medicine, and engineering, **my research** casts light on the ways in which upward mobility and kin support interact – and here I highlight three key insights.

(i) Supporting families: money, care, and professional expertise

I find that sustaining strong family connections is often experienced as a *moral obligation*. Carmen, a doctor in her mid-30s, explained: “Devolverle la mano a mis viejos (to give a hand back to my parents) is a moral duty for me... I help them in whatever way I can,” highlighting the sacrifices her parents and grandparents made to support her and her sister.

This sense of duty takes many forms. Financial support is common: Rodrigo, an engineer, buys groceries weekly for his mother and sister: “Almost without exception, I visit my mother and sister and leave with them the food I buy.” Ana, another engineer, contributes a third of her monthly income to her parents, and Javier, a doctor, purchased a new home for his mother. Support also includes professional expertise: Pablo, a lawyer, helps relatives (including extended family) with legal matters, noting: “I basically deal with problems similar to the ones of my own family... Of course I help them.”

Support often intensifies after parental retirement, as vulnerability rises due to **declining health** and limited pensions. Ana described the comprehensive nature of caregiving: “We take care of everything... managing their finances, paying for a caregiver, buying expensive medications... or simply dedicating a lot, a lot of time and energy.” These accounts show that upwardly mobile Chileans often act as key providers, using money, skills, and time to fill gaps left by limited public support.

(ii) The costs of helping kin

Kin support comes with significant personal costs. Francisca, a top engineer, turned down a doctoral opportunity in France: “I just could not do it... I needed to find a job, pay my debts, and help my parents,” acknowledging the impact on her career and income. Rodrigo similarly declined studies abroad to care for his sick father: “I still feel I could not exploit my full potential... others have not carried the same family responsibilities.”

The burdens are often emotional, and they disproportionately affect women. Catherine, a lawyer, described constant pressure to contribute financially: “It is a very difficult weight to bear

emotionally... It is very difficult to explain to them that I am not rich just because I am a lawyer.” Ana provides financial support and undertakes most caregiving tasks: “I am the one who does more of the care work... accompanies my father to the doctor, and things like that, much more often.” These examples highlight the hidden trade-offs of upward mobility, particularly the dual burden of professional and familial responsibilities for women.

(iii) Strategies for managing kin demands

To cope, some participants adopt collective approaches, often involving partners or relatives. Carlos, a doctor in his early 60s, described sharing responsibilities with his spouse: “We work like a team... we do our best to support our families in whatever way they might need from us.” Andrea, another doctor, scaled back support once her niece achieved financial stability, showing how redistributing family responsibilities can ease emotional strain.

When collective support is unavailable, participants rely on *selective boundary-setting*, limiting help to certain relatives. Loreto, an engineer, assists her mother and some cousins but avoids relatives she perceives as opportunistic: “I love my relatives, and I care for their situation, but I cannot help them all the time and all of them.” Marta, a lawyer and the only high-status professional in her family, focuses her support on her father and niece: “She is very smart and hard-working... like I was, a good student. And I want to encourage that.” These strategies allow upwardly mobile individuals to balance *family loyalty* with the practical and emotional costs of support.

Rethinking upward mobility in a world of rising inequality

Upward mobility is rarely a straightforward path to financial independence or personal freedom. For many, moving up the social ladder brings new responsibilities, costs, and vulnerabilities: career opportunities may be deferred, financial resources redirected, and emotional energy stretched to support parents, siblings, and extended kin. In Chile, as in much of the world, upward mobility is rarely a solo journey; *moving up* often means *reaching back*, providing financial, emotional, and practical support to one’s family of origin.



Upward mobility is rarely a solo journey; moving up often means reaching back, providing financial, emotional, and practical support to one’s family of origin



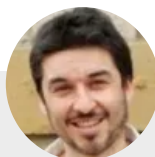
Understanding mobility in these relational terms has important implications for how we think about inequality. Policies that focus solely on education or jobs risk overlooking the wider social and familial contexts that shape the benefits and costs of upward mobility. In settings with limited welfare provision, the upwardly mobile often act as key providers, particularly women, who bear **much of the caregiving work**. Recognising both the opportunities and hidden costs of mobility offers a more nuanced picture: social ascent is not just about individual achievement but about negotiating personal advancement alongside enduring and expanding family obligations – a dynamic increasingly visible across the Global South and Global North.

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