

## **SPATIAL INEQUALITY: A RESEARCH AGENDA FOR THE SOCIAL SCIENCES**

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## **SPATIAL INEQUALITY: A RESEARCH AGENDA FOR THE SOCIAL SCIENCES**

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### **Abstract**

This white-paper documents the need for the development of research on spatial inequality across the social sciences. Building on and significantly extending earlier work initiated as part of Santa Barbara's NSF-supported Center for Spatially Integrated Social Science, we see the need to greatly expand empirically and further theorize the consequences of rising spatial inequality within and outside the U.S. As global economic, social, and climate changes rapidly alter the fortunes of populations, a more cohesive social science understanding of spatial disparities is needed. Spatial inequality addresses how and why valued resources vary across places; and how places themselves become markers and makers of inequality. Spatial inequality bridges the geographic and non-geographic social sciences and the different inequality traditions within sociology, economics, political science, and geography. This white-paper calls for a fundamental shift from social scientists' past tact in addressing spatial disparities through production of segmented literatures underpinned by limited dialogue between disciplines. Attention to spatial inequality opens new thematic areas for investigation, fosters cross-fertilization of theoretical and empirical traditions, and responds to issues central to society's well-being. We argue for a new generation of research to carve out theory and research across and within disciplines and leverage cutting-edge work.

## INTRODUCTION

*Challenge Question:* How do we build social science capacity to understand profound and emerging disparities in social, economic, and environmental conditions across places?

*Rationale:* Economic restructuring, environmental change, the emergence of new forms of governance, and other global shifts unevenly affect places and populations. As these changes intensify, gaps between rich and poor places are appearing to widen with the prospect of further expansion over time. Regardless of development, new pockets of poverty and prosperity are surfacing. These spatial changes are altering the social fabric, economic resources, and environmental conditions that define the quality of life in various places. Past evidence indicates spatial inequality is costly to society as large numbers of people fail to achieve their fullest capacity leading to underperforming assets and disparities in long run consequences for growth and development. While the social sciences are cognizant of these macro-scale changes, existing research lacks needed theoretical approaches and methodological tools to adequately measure, model and represent their spatial manifestations in a coherent manner. Research is segmented by discipline, and by spatial and by inequality focus, resulting in segmentation within and across disciplines. This white paper outlines the value of a cohesive interdisciplinary social science initiative to understand critical spatial inequality issues. How and why are poverty and prosperity differentially distributed across places? How are different forms of well-being linked and overlaid across spatial settings? How do inequalities at one spatial scale influence those at another? What responses from civil society and government offer promise for improving well-being across places?

Inequality, the differential allocation of scarce and valued resources across social groups, has long concerned social scientists. Yet, social scientists too often neglected geographic territory as a basis for stratification. While attending to the question of *who gets what*, they often failed to consider *where*. Researchers today recognize the importance of analyzing the spatial dimensions of human behavior and socioeconomic, health, and environmental conditions. NSF has contributed by funding the Center for Spatially Integrated Social Sciences (CSISS) which diffused geographic knowledge in a vast learning network. Within sociology, the NSF-ASA Fund for the Advancement of the Discipline provided funding for workshops and a book promoting the study of spatial inequality (Lobao, Hooks, and Tickamyer 2007). Even with these investments in scholarship, considerable lag in integrating the variation in research on spatial inequalities remains.

Some examples illustrate research issues that spatial inequality raises across the social sciences:

- the long rise in national patterns of income inequality, where lagging regions cannot afford investments in their own people or in the basic infrastructure that will allow their region the ability to catch up;
- rising income polarization within regions such as southern California, the Eastern Seaboard, and the Philadelphia-Washington DC megalopolis;

- climate/environmental changes that alter preexisting resources in their use and valuation;
- the development of new sources of energy such as Marcellus gas shale that create social, economic, health and disparities;
- the persistence of poverty as seen in US-Mexican border locales, the rural south, Appalachia, and Indian reservations;
- mass immigration and the strains placed on local economies and services;
- subnational governments' responses to widespread recession;
- global economic effects on communities such as due to investment/disinvestment by international firms; and
- disparities in residential foreclosure and commercial vacancy rates leading to the destruction of neighborhoods and entire communities.

In some sense, spatial inequality is taken-for-granted as so much spatial data are now available. NSF reports science indicators by state – revealing sharp geographic disparities in science and engineering Ph.Ds and federal and academic-science spending. Great progress exists in social scientist utilization of spatial data from the Census, Department of Justice, and other agencies--but conversations tend to be insular. Theories and methods to advance understanding of spatial inequality have not kept up with data availability nor with pressing social problems.

From several disciplines, the authors have studied how geographic territory is related to different forms of inequality. Innovations are said to come into disciplines from the margins by introducing outside approaches into established perspectives. By reading outside disciplinary silos and forging linkages with other scholars, we found a series of common challenges addressed below.

## **THE STATUS OF SPATIAL INEQUALITY RESEARCH**

Literatures on spatial inequality are most developed at the scale of the city, nation-state and global system. In emphasizing their respective territories, these literatures imply that different territories are distinct species of social settings, whose principles of understanding are unconnected. Further, certain geographic scales, such as those involving regional, rural, or other subnational territory receive little attention. Here we provide a brief overview of research across the social sciences, particularly that challenging conventional approaches.

*1) The development of new hybrid literatures.* Spatial inequality has been highlighted by leading sociologists such as Anthony Giddens, geographers such as David Harvey, and economists such as William Easterly and Esther Duflo. These contributions notwithstanding, spatial inequality is not taken as a common thread across disciplines. Analysts often borrow concepts, theories, and methodologies from outside their home disciplines, creating new, hybrid and interdisciplinary literatures with the potential to transform current disciplines and debates, including: the poverty and place literature (spanning sociology, geography, regional science, demography); research on regional and community environmental well-being (spanning geography, sociology, and regional

economics); research on health disparities (spanning epidemiology, demography, sociology, and geography); and research on governance/decentralization and inequalities (spanning political science, sociology, and economics). The poverty and place literature at the subnational scale is particularly developed through joint contributions of geographers (e.g., Glasmeier *Poverty in America: One National Pulling Apart 1960-2003*), economists (e.g. Partridge and Rickman, *The Geography of American Poverty*) and sociologists (e.g., *The Sociology of Spatial Inequality*).

2) *Expanded range of spatial scales.* Large literatures examine inequality and development at the global and nation state scale on the one hand and variation internal to cities on the other. But a large swathe of places, people, and research questions are ignored because they fail to fall into these binary categories. New hybrid literatures fill in gray areas that have received limited scrutiny, especially social science’s missing-middle: the subnational scale, the territory above the city but below the level of the nation-state. U.S. scholars once gave broad attention to regional inequality (such as Appalachia). In the European Union there is massive, on-going interest in regional inequality through its cohesion policy. Analysts have also integrated the study of inequality processes across geographic scales—recognizing processes spanning households, communities, regions, and nations.

3) *Studying non-conventional “places.”* In moving beyond established traditions, researchers use less familiar place-units, raising questions about how such places are to be conceptualized and treated empirically. Examples are comparative analyses of states, regions, counties, and labor markets. These units may be the same across studies but are used conceptually in different ways, reflected in methods of analysis and the meaning assigned to these units.

4) *Convergence on theories and methods employed when studying spatial inequality.* Thematically, analysts have examined a range of determinants that pertain to their particular dependent (outcome) variable of interest. While addressing debates specific to one discipline, there is a great deal of complementarity. For example, in the case of the poverty-and-place literature, sociologists, geographers, and economists converge on three set of determinants: (1) economic structure or employment opportunities; (2) demographic vulnerability to poverty, such as attributes of age, education, ethnicity, and family structure; and (3) geography such as regional location. Methodological protocols are also very similar (both qualitative and quantitative approaches). On the methodological front, core challenges (e.g., spatial autocorrelation and endogeneity) are also recognized.

5) *Developing theory within disciplines.* The new generation of social science work also builds theory within disciplines. Theoretical efforts are examining the spatial dimensions of social constructs important to different disciplines, such as the state, civic society and industrial structure, and how these relate to inequality.

In sum, social scientists are producing theoretically informed, spatially comparative

work. But studies remain fragmented by discipline—and within discipline, by subfield and by approach. Researchers have produced a wealth of insights into theory and methods and understanding of different inequalities. An NSF initiative to build on these efforts offers numerous advantages. For theory, aspatially-framed or national generalizations about development and well-being may be challenged, rejected, or revised to develop theoretical frameworks that take into account the diversity across spatial settings. A spatial approach to inequality and poverty will spur innovative approaches to conceptualizing research questions, analyzing data, and engaging with civic society and policymakers.

## **SPATIAL INEQUALITY: AN AGENDA FOR FUTURE WORK**

How can we further advance the study of spatial inequality? We outline a broad project, one designed to integrate the study of spatial inequality more holistically across disciplines.

First, social scientists need to extend research substantively to consider the manner in which territories themselves become stratified. Currently, research centers on how socioeconomic, health or other disparities are distributed among populations spatially. Examining territorial inequality is an important issue particularly as climate change and natural disasters transform environments and people's lives. To address this issue requires attention to distinct social, economic, political and environmental factors creating uneven development, how they shape a gestalt of place attributes, and how they can foster potential path-dependent development.

Second, we need to develop a more systematic conceptual template to study both the distribution of inequality and the forces creating disparities at different scales. Social scientists' comparative disciplinary strengths in studying stratification should be harnessed to develop more general principles about the operation of stratification processes across scales. There is too little collective effort to theorize inequality across disciplines; current efforts are more focused on *within* discipline debates and literatures. For example, while social scientists know that there is tremendous spatial heterogeneity in how institutions and economic growth affects poverty, there is very little understanding as to why some approaches to poverty reduction work better in some settings but not others. Likewise, is there substantial self-sorting in which the poor choose to live in poor places or are there barriers that do not allow the poor to relocate to more prosperous locations? Should policy focus on poor places or should it target poor people and hope that they relocate to more prosperous locations?

Third, we should look at spatial flows and processes. Stated otherwise, this initiative should shift away from a *de facto* belief that various spatial scales are distinct (*sui generis*) from one another. Recent calls for a "relational social science" emphasize the importance of shifting attention to flows to better address continuity between local, regional, national, and global structures and processes.

Fourth, we need greater attention to human agency and how social actors strategically

use and create spaces and places. Individuals and organizations routinely make strategic use of space to achieve ends ranging from the deliberate location of new settlements to selection of communities by corporations seeking to invest or divest business.

Fifth, the social sciences need to build a stronger methodological foundation for studying inequality across space, extending the gains made by the CSISS initiative.

Sixth, to build a more comprehensive social science of spatial inequality, we should continue to build within disciplines. We argue for better linkages within disciplines between spatial traditions and inequality traditions; and for the greater integration of existing literatures on spatial inequality across geographic scales.

Finally, greater linkages between the geographic (geography and regional science) and non-geographic disciplines (sociology, economic, political science) should be cultivated. The latter disciplines have been enlivened by the steady diffusion of conceptual frameworks and methodologies from human geography and regional science.

In putting forth this agenda, we propose the development of a deeper and more comprehensive approach to the study of spatial inequality. We see this approach as grounded in social science's stratification heritage, where questions about poverty, privilege and power are prominent concerns. This approach entails respect for different research traditions and scales of social action, but advocates a more holistic social science vision focused on a core question: *who gets what -- where?*

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