When and Why Is Economic Inequality Seen as Fair

Kris-Stella Trump

Department of Political Science
University of Memphis
Memphis, TN
United States

ktrump@memphis.edu

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Abstract

Economic inequality is seen as fair when people believe it to be the result of fair processes, or in other words, in accordance with normative rules about resource allocation. As a result, people may support substantial inequalities of outcome as fair. There is broad agreement, within and across societies, on the normative rules that govern resource allocation. However, when people use these rules to evaluate specific instances of inequality, their conclusions are systematically affected by available information, self- and group-interest, and system justification. This causes divided opinions regarding the fairness of specific inequalities. Recent evidence suggests that growing economic inequality does not directly impact perceptions of fairness, but may reduce perceptions of meritocracy, thereby indirectly reducing the legitimacy of inequality.

The United States is experiencing historically high levels of economic inequality [1], without experiencing historically high public opposition to it [2-3]. This reality, in combination with the decreasing cost and increasing technical feasibility of survey experimental research, has led to a surge of high-quality and interesting empirical research on when and why economic inequality is seen as fair.

This recent research builds on a significant body of earlier psychological and public opinion research on the legitimation of inequality. We know from previous work that public attitudes toward inequality are complex and occasionally contradictory: for example, while popular dissatisfaction with inequality is typically high [4], this dissatisfaction does not change thermostatically in response to increasing inequality [5]. Similarly, people may express normative opposition to large income differences but oppose specific plans for the redistribution of income [6-7]. Classic economic models, based on the assumption that economic self-interest drives opinion toward economic inequality, work well for explaining why people who would benefit from redistribution support it, but are less adept at explaining why the same people may oppose redistribution and even endorse economic inequality as a fair outcome. The recent studies summarized in this review[1] use this state of knowledge as a starting point, and jointly explore when and why members of the public accept economic inequality as fair.

In this review, I will argue that an emerging consensus, based on the last two to three years of published studies, points to the primacy of shared normative rules (as opposed to inequality aversion or economic self-interest) in shaping attitudes toward economic inequality. People accept inequalities that are seen as fair, and they evaluate fairness by referring to normative rules that govern resource allocation. In the rest of the article, I will refer to these normative rules as allocation rules. Allocation rules are broadly agreed upon, not only within but also across societies; the next section will give examples of such rules. Disagreements regarding the fairness of inequality primarily arise from ambiguities regarding *whether* and *which* of the agreed-upon allocation rules can adequately explain specific instances of inequality. These ambiguities of interpretation create room for judgments of fairness to be systematically affected by available information, self- and group interests, and system justification, each of which explains variation in which inequalities are seen as fair, and by whom.

The primacy of fairness considerations

The acceptance or rejection of economic inequality depends on whether the inequality in question is perceived as fair. In other words, rather than being averse to inequality *per se*, people object to inequality only when it violates allocation rules that can justify unequal outcomes as fair [8*]. The allocation rules used to judge the fairness of economic outcomes tend to be broadly

[1] This review is primarily focused on studies of public opinion regarding society-level economic inequality in advanced industrialized countries. Disproportionate attention is paid to the United States, reflecting the empirical focus of available studies. This means that all conclusions, including the observation that normative rules regarding resource allocation are broadly shared, are limited by the geographic reach of the underlying evidence. Additionally, the studies in this review are predominantly drawn from the fields of political science and social psychology. The review asks when society-level economic inequality is perceived as fair; when drawing on studies in political science, support for government redistribution is treated as a sufficient (but not necessary) sign of the perceived unfairness of underlying inequality.

agreed upon; this is true even in situations where people disagree in their evaluations of a concrete instance of inequality [9-10].

Most prominently, inequalities produced through individual effort and merit are seen as fairer than inequalities produced through luck [9, 11-12]. Additionally, inequalities between in- and outgroup members are seen as more legitimate than inequalities between in-group members [13], and economic mobility is interpreted as a sign of meritocracy, which in turn justifies unequal outcomes [14]. In a similar fashion, attitudes toward the appropriateness of redistribution (which reduces economic inequality) are informed by broadly shared criteria used to judge the deservingness of the beneficiaries of redistribution [10, 13, 15-17]; these criteria include not only merit/effort, but also reciprocity and recipient's attitude.

Applying abstract allocation rules to concrete situations necessarily leaves room for disagreement and motivated reasoning. In real-world scenarios, it can be difficult-to-impossible to assess with certainty whether and to what extent abstract allocation rules can justify specific instances of inequality. For example, whether a given inequality is due to merit or luck may be only partly observable and thus a matter of interpretation. Alternatively, more than one allocation rule may simultaneously be applicable, for example when an effort-based inequality advantages an outgroup member. These ambiguities open the door to disagreements, including disagreements that result from motivated reasoning.

As a result, the way we apply allocation rules is systematically affected by factors such as available information, economic self- and group-interest, and system justification. Below, I focus on each of these factors in turn, before concluding with a broader look at the role of economic mobility and socio-political institutions in affecting interpretations of inequality.

Available information

In order to assess whether a given instance of inequality is fair, citizens first need information about the inequality in question. Information about inequalities, however, is not evenly accessible to all citizens. Differences in available information can systematically affect whether and which allocation rules citizens perceive as appropriate explanations for inequality.

For example, economic inequality on the national level is difficult for citizens to perceive accurately: underestimation of true levels of inequality is both commonplace [18-19] and varies by demographic characteristics of the perceiver [20]. While the trend of increasing inequality in the United States is generally more attributable to non-meritocratic variables such as gender and race inequality, rather than meritocratic variables such as education and hours worked [21], such analyses are not readily observable by citizens. Even though accurate numeric information about inequality does not reliably change normative attitudes toward it [22*, 23], systematic underestimation means that citizens are typically evaluating a more equal system than really exists. This may cause citizens to (appear to) endorse more unequal outcomes than they intend to.

Economic mobility increases the perceived fairness of economic inequality, but whether and to what extent citizens can observe economic mobility is itself the subject of an ongoing scholarly debate [24-26]. Different perceptions of economic mobility can lead citizens to different conclusions regarding the fairness of unequal outcomes [14].

Finally, even when they have access to identical factual information, individual dispositions such as the social dominance orientation affect how much inequality people perceive, with those who are motivated to defend the existence of hierarchies or the status quo perceiving *less* inequality [27*]. In sum, available information can systematically change which allocation rules appear plausible as explanations for observed inequalities, and this in turn affects which inequalities citizens accept as fair.

Self- and group interests

Both self- and group interests can systematically affect which allocation rules people perceive as good explanations for specific instances of inequality. On the individual level, economic self-interest can change our conclusions regarding the fairness of unequal outcomes. For example, in a game where success was more likely in randomly assigned conditions, people who won the game perceived the game as fairer [28*]. (The selective application of allocation rules has limits, however. For example, removing an explicit reference to a justifying allocation rule limits participants' self-interest-driven defenses of unequal outcomes [29].) Similarly, people are more likely to support redistribution when it would economically benefit themselves [30, 31].

In addition to individual self-interest, economic group interests also affect assessments of fairness; for example, people are more likely to react to group-based differences in income with increased demand for redistribution *if* their own group is disadvantaged by the inequality [32]. Note that the proposed role of self-interest here is slightly different than postulating a *direct* impact of economic self-interest on acceptance of inequality. Rather than directly promoting their economic self-interest regardless of perceived fairness, people perceive situations that benefit themselves as fair and therefore accept them as justified.

Self-interest can interact with the availability of information. It is common for people to inaccurately place themselves in quintiles of national household incomes (people tend to believe they are closer to the median than they really are) [33-35]. This raises the possibility that the legitimacy of national-level inequality would change if people were accurately informed about their position in the income distribution. While theoretically plausible, recent experimental evidence on this hypothesis is mixed. Experiments typically inform people of their true position in the income distribution, and then measure either endorsement of inequality or support for redistribution. Not all such experiments yield positive results [36], and those that do [33-35, 37-38] tend to work among different subgroups of participants or only in some countries, making generalizations difficult. One way to interpret the mixed results is to hypothesize that an individual's position in the income distribution has conditional effects on which allocation rules they perceive as plausible explanations for unequal outcomes, and that these effects may be moderated by features of social or political context [31, 39-42].

System justification

The system justification motivation is a motivation to perceive one's social system as fair; it manifests as a tendency to interpret "what is" as "what ought to be" [43-44]. This motivation causes people to interpret existing economic inequality as fair [22*]; high system justifiers are motivated to interpret inequality as consistent with allocation rules that justify it [43]. In other words, in otherwise ambiguous situations, system justification makes it more likely that inequality will be perceived as in accordance with an available allocation rule. Evidence consistent with system justification shows, for example, that the association between perceptions of inequality and support for redistribution depends on the respondents' adherence to inequality-justifying beliefs [45*, 46].

Situational variables can affect the strength of system justification [44]; for example, perceptions that inequality is inevitable are related to reduced support for redistribution [47]. There are concerns that inequality itself can be a situational variable that sets in motion broader psychological and social processes that reinforce acceptance of inequality [48-49], potentially by increasing popular belief in system-justifying ideologies. Partially mitigating fears of an escalating feedback loop between system justification and inequality, however, recent evidence suggests that simply being exposed to increasing economic inequality does not reinforce the system justification motivation in particular [50].

In all, the system justification motivation increases the probability that specific instances of inequality will be interpreted as consistent with allocation rules that justify inequality.

Perceptions of economic mobility

The public tends to interpret economic mobility as an indicator of meritocracy [14], which makes perceived economic mobility a powerful legitimizer of economic inequality. The inequality-legitimizing power of economic mobility is well established in literature that predates the scope of this review. In the recent years covered here, an extension of this argument has received significant scholarly attention: the proposition that increasing economic inequality reduces perceived economic mobility, thus eroding the legitimacy of economic inequality. This hypothesis is particularly intriguing because it suggests that increasing economic inequality may indirectly undermine its own legitimacy; this expectation contrasts with concerns that inequality activates self-reinforcing social and psychological processes [49, 51].

So far, there is mixed evidence for this hypothesis. Looking first at cross-sectional studies, evidence consistent with this hypothesis shows that perceptions of higher inequality are associated with weaker belief in meritocratic principles and more support for redistribution [52]. However, other cross-sectional studies find that citizens of more unequal societies are *more* likely to attribute economic differences to meritocratic factors [53], and that experiencing more inequality in one's lifetime is associated with lower support for redistribution [54]. Looking secondly to experimental studies, current findings appear supportive of the hypothesis that economic inequality reduces perceived economic mobility and the legitimacy of inequality. In the United States, information about wealth inequality can reduce perceived social mobility [55], and in a cross-national survey experiment, pessimistic information about mobility increased support for redistribution among left-wing individuals [56]. In a third experiment, information about income inequality reduced belief in meritocracy and increased support for social spending [57*].

This body of research having emerged recently, the final word is not yet in on whether economic inequality reduces perceived economic mobility and therefore undermines its own legitimacy. Outstanding avenues for research include the reconciliation of conflicting findings, exploring boundary conditions on the phenomenon, and asking why inequality in the United States has grown for decades without beliefs in meritocracy observably declining.

Conclusion and future avenues

Considering attitudes toward economic inequality through a theoretical frame of broadly shared allocation rules is helpful for tying together recent literature on the legitimation of inequality. One strength of this framework is that it can incorporate the observation that economic self-interest matters for whether inequality is perceived as fair, while remaining flexible enough to incorporate other influences, such as group interests, individual predispositions, and the availability of information. The framework also allows for examinations what might be called cross-pressured judgments: what happens when several allocation rules are simultaneously applicable, or when individuals' dispositions/economic situations push in conflicting directions? At the same time as this approach helps consolidate what we currently know, it also serves to highlight what we do not yet know.

First, there are research questions that arise as direct follow-ups to some of the findings summarized above. We do not yet understand the conditions under which finding out one's own position in the income distribution provokes a self-interested response, nor when information about unequal economic outcomes reduces perceived mobility. Secondly, there are broader questions that this review has bracketed. Some intuitions about what constitutes fair inequality are clearly broadly shared, especially moral reasoning related to merit vs. luck. However, it is unclear what the universe of such broadly accepted moral principles is, whether and how frequently the pursuit of equal outcomes is seen as an applicable allocation rule in itself, how these rules interact with each other, and how far they travel across cultures.

Finally, attitudes toward fairness, based as they may be in psychological intuitions, are always refracted through social and political institutions. Institutions help individuals interpret sociopolitical realities not only by providing information but also by emphasizing specific normative frames through which to view inequality. For example, in U.S. states with a higher concentration of labor unions [58], increasing inequality is related to increased support for redistribution. Likewise, the media plays a consequential role in shaping both portrayals of inequality and of potential solutions to it [59]. Political elites affect their co-partisans' understanding of what constitutes fair inequality [31]. In other words, the interpretation of inequality, while powerfully influenced by fundamental psychological tendencies such as system justification and the pursuit of self-interest, is also affected by political institutions that help people make sense of the economic outcomes they observe.

In future research, we need to delve deeper into the interactions between psychological and sociopolitical variables that affect how we evaluate inequality. I hope that in this endeavor, a framework that focuses on broadly shared rules of fairness, and seeks to understand how we apply these rules, can serve as a useful tool for further inquiry.

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