



Global Trends in Socioeconomic Status and Its Broader Impact: A Hybrid Systematic Literature Review and Bibliometric Analysis

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Abstract. Socioeconomic status (SES) is a multidimensional construct that influences health, educational attainment, and economic mobility throughout the life course. This study examines global research trends on SES and its broader impacts while identifying key structural mechanisms and policy implications. A Hybrid Systematic Literature Review (SLR) integrated with bibliometric analysis was conducted following the PRISMA 2020 reporting guideline. Literature was retrieved from the Web of Science Core Collection, where an initial search yielded 1,955 records. After the stages of identification, screening, eligibility assessment, and inclusion, 52 journal articles published between 2020 and 2026 met the predefined selection criteria and were included in the final analysis. Bibliometric mapping was employed to examine publication patterns and thematic relationships, while thematic synthesis was used to interpret the findings. The review shows that socioeconomic disadvantage consistently contributes to poorer health outcomes, unequal educational opportunities, and limited economic mobility. Existing studies primarily focus on health and education, whereas governance, policy implementation, and institutional responses remain comparatively underexplored, particularly in developing countries. The findings suggest that improvements in education and labor market participation alone are insufficient to reduce structural inequality without complementary investments in equitable public infrastructure, social protection, and inclusive public policies. Future research should strengthen evidence from low- and middle-income countries and further examine governance mechanisms that can effectively reduce persistent socioeconomic disparities.

Keywords: Economic mobility, Educational attainment, Health disparities, Income inequality, Social determinants of health, Socioeconomic status.

1 Introduction

Socioeconomic status (SES) inequities continue to be one of the most basic structural problems in today's world. SES is a multidimensional concept defined by a set of indicators such as income accumulation, educational attainment, and occupational prestige [1], [2]; and deeply influences the human life chances. This need to compare the trends in these dynamics globally is driven by a paradigm change in social and epidemiol. Traditional medical treatments have been found to contribute no more than 10–15% of the total health of a population. Rather, the social and environmental determinants of health (SDOH) collectively account for 50–60% of the health and material inequities [3]. Thus, macroeconomic income inequality directly contributes to the clinical, psychosocial and Socioeconomic burden at a global level and leads to simultaneous disruption of human development ecosystems [4].

These changing SES trends have an inter-sectoral domino effect. This goes against the principle of equality, and it certainly effects marginalised groups, such as racial and ethnic minorities around the world. In the context of global health, people with lower SES are disproportionately affected by chronic conditions like diabetes, cardiovascular disease, and stroke, as well as by worse outcomes from access to therapeutic innovations and preventive health [5], [6]. For example, minorities, such as African Americans and Hispanics, are at 2–3 times higher risk of stroke, while enjoying much lower rates of routine, preventive health care [6], [7].

These detrimental impacts are inextricably linked with the education system and mental abilities. Children's foundational diets can be affected by various SES indicators from the beginning of pre-adolescence, despite the ability to understand the interplay between these indicators early in pre-adolescence [1], financial constraints alone are found to impact their intake of essential nutrients [8]. The multidimensional crisis reached its zenith in the COVID-19 pandemic and the growing shocks of climate change. Psychological stressors were worsened by the shift to online learning and the resulting global economic downturn. This dramatically drove up the global burden of anxiety disorders from 720.26 to 880.87 per 100,000 people, and major depressive disorders from 2,333.91 to 3,030.49 per 100,000 people, particularly among adolescents from impoverished families [9], [10].

Although there are many reported cases documenting these phenomena, four important systemic research gaps impede the understanding of SES: (1) Terminological Inconsistency and Conceptual Fragmentation: The different SES measures are classified differently in different studies, particularly in the definitions of occupation and income/wealth in LMICs. Upstream dimensions producing inequality are often ignored in empirical designs [11], [12]. (2) Previous literature reviews have been biased towards static income and individual level outcome measures. They also fail to replicate studies in different geographical areas, restricting the generalizability for the region [13]. (3) Lack of Corporate and Planetary Antecedents: Research is limited and often fails to consider how both socioeconomic and socio-ecological crises are being caused by unsustainable economic models, thereby exacerbating socio-ecological health inequities at the local and global level [14]. (4) Limited Longitudinal and Cross-Cultural Perspectives: Limited long-term data to address the variability of environmental inputs and macroeconomic impacts on women and men [15], [10].

To address these limitations, this study adopts a Hybrid Systematic Literature Review (SLR) integrated with bibliometric analysis. Following the PRISMA 2020 reporting guideline, an initial search of the Web of Science Core Collection identified 1,955 publications related to socioeconomic status. After the processes of identification, screening, eligibility assessment, and inclusion, 52 journal articles published between 2020 and 2026 met the predefined eligibility criteria and were included in the final review. Bibliometric mapping using VOSviewer and CiteSpace was employed to identify publication trends and thematic relationships, while thematic synthesis was conducted to interpret the structural relationships among SES, health, education, economic mobility, and governance [16]. In particular, this inquiry has three overarching research questions: a) What are the patterns of SES research in the world literature? b) What is the structural relationship of SES and macro-level health, education and economic outcomes? c) What are the governance structures and policy interventions that contribute to closing Socioeconomic gaps?

The novelty of this article is its attempt to provide an integrated conceptual framework that conceptualizes SES as a non-linear developmental process that takes advantage of vulnerabilities in brain and cognitive functions [17]. The primary contribution of this study lies in integrating bibliometric evidence with thematic synthesis to provide a broader understanding of SES as a structural determinant operating across multiple domains. Rather than discussing health, education, or economic mobility independently, this review examines how these dimensions interact within wider institutional and governance contexts. By incorporating recent concepts such as economic connectedness, which has been associated with improved intergenerational income mobility [18] and evidence on community-based interventions that strengthen early childhood development among disadvantaged populations [19], this study extends existing literature beyond descriptive patterns of inequality. The findings are expected to provide both a clearer research agenda and practical policy insights for promoting more equitable and sustainable socioeconomic development across diverse national contexts [20].

2 Literature review

2.1 The Capabilities Approach

The Capabilities Approach (CA), developed by Amartya Sen and Martha Nussbaum, provides an advanced, multidimensional framework for assessing well-being of the world's populations that goes beyond the static income or utility-based approaches. It is an upstream analytical lens in the context of the research about “Global Trends in Socioeconomic Status and its Wider Consequences.” It aids in understanding the dynamic between traditional measures of Socioeconomic status (SES) (income, education, occupation) and the actual ownership of assets. Instead, they establish a person's substantive freedoms (capabilities) the capability to achieve various life outcomes that are valuable to them to live healthily, to enjoy good mental health, to move socially, etc.[21], [22], [23]. This theory includes concepts such as eco-capabilities that enable a critical examination of the unequal vulnerabilities of marginalised groups as these are exacerbated by global macro-trends like climate shocks, social protection exclusion and health crises, to systematically limit the agency and living space of these groups [24], [25].

The application of the Capabilities Approach within this Hybrid Systematic Literature Review and bibliometric analysis proves essential, primarily through its deconstruction of conversion factors (personal, sociocultural, and institutional). This concept offers a robust theoretical explanation for why economic stimuli or sectoral innovations such as digital health ecosystems and energy infrastructure frequently fail to translate into equitable well-being outcomes at the global level [26], [27], [28]. As bibliometric network analysis (via Web of Science, VOSviewer, and CiteSpace) reveals cross-national disparities in life expectancy, digital alienation during educational disruptions, and financial anxiety, these institutional and structural conversion factors emerge as the primary mediators [29], [30], [31]. Integrating CA with Fundamental Cause Theory and Socio-Technical Theory in this hybrid study allows researchers to shift away from merely documenting descriptive (monolithic) inequality, moving instead toward a human-centered, complex systems approach [32], [33]. In the end this approach gives global policy makers an important taxonomic guide and normative framework to create empowerment policies that not only redistribute material resources, but also actually increase substantive freedoms and social justice for all groups in society. [24], [27].

3 Methodology

This study employed a Hybrid Systematic Literature Review (SLR) integrated with bibliometric analysis to examine global research trends and the broader impacts of socioeconomic status (SES). The review followed the Preferred Reporting Items for Systematic Reviews and Meta-Analyses (PRISMA 2020) reporting guideline to ensure a transparent and systematic selection process. Literature was retrieved from the Web of Science Core Collection, supported by the *answerthis.io* platform for literature retrieval and organization. The search was limited to English-language empirical articles published in Q1 journals between January 2020 and June 2026, using the keywords “*Socioeconomic Status*,” “*Health Disparities*,” “*Income Inequality*,” “*Educational Attainment*,” “*Social Determinants of Health*,” and “*Economic Mobility*.” The initial search identified 1,955 records, which were subsequently processed through the PRISMA stages of identification, screening, eligibility assessment, and inclusion. Duplicate records were removed, followed by title and abstract screening to determine their relevance to the research objectives. Full-text articles were then assessed according to predefined inclusion and exclusion criteria. Studies were included if they were empirical journal articles published in English, explicitly examined one or more dimensions of SES, and addressed health, education, income inequality, social determinants of health, or economic mobility. Editorials, conference abstracts, book chapters, duplicate records, non-English publications, and studies unrelated to the research objectives were excluded. Following this selection process, 52 articles met all eligibility criteria and were included in the final review. Bibliometric analysis was conducted using VOSviewer and CiteSpace to identify publication trends, citation patterns, keyword co-occurrence, and thematic relationships, while thematic synthesis was applied to interpret the structural links between SES and health, educational, economic, and governance outcomes. The thematic percentages presented in the Results section were derived through descriptive content coding, in which each

article was classified according to its primary research focus and calculated as a proportion of the total reviewed studies.

4 Results and Discussion

4.1 How have the trends and structure of SES research evolved within the global literature? (RQ1)

To map the existing literature on socioeconomic status (SES), 52 selected articles were evaluated across six core analytical categories ranging from health disparities to policy interventions. By employing a flexible coding framework that allowed for overlapping themes, this approach successfully outlines the field's primary research priorities alongside its fluctuating publication dynamics from 2020 to 2026. Scholarly engagement with these topics grew substantially over time; following a relatively modest output in the early years, publications surged to a peak of 23 articles in 2025. This sharp upward trajectory highlights a rapidly expanding academic interest, a trend that remains clear even when accounting for incomplete mid-year indexing in 2026. Figure 1 presents the annual distribution of the 52 articles included after the PRISMA selection process. The publication trend illustrates the increasing scholarly interest in socioeconomic status during the study period.

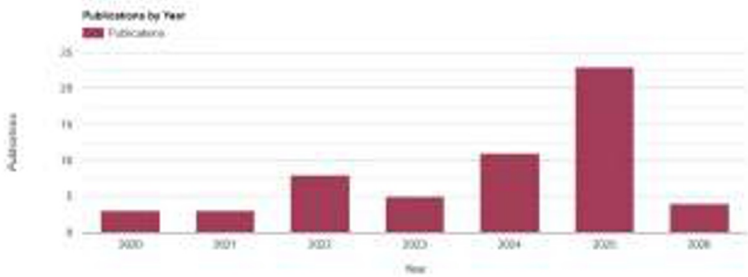


Figure 1. Publication by Year

The 2020-2026 citation count per publication ranged from a high of 160 to a low of 41, trending down on average. This was sharply up in 2020 to around 542 citations, but dropped significantly in 2021. There was a short increase in 2022, but then a precipitous decline to stay below 15 citations per year over the last four years (2023-2026). This leveling off of the number of citations in the latest years is completely predictable as it is the usual "time lag" effect of research absorption, that is, newer articles simply took longer to accumulate citations. Citation analysis was conducted to examine the scientific influence of the selected publications over time and to identify the maturity of the research field.

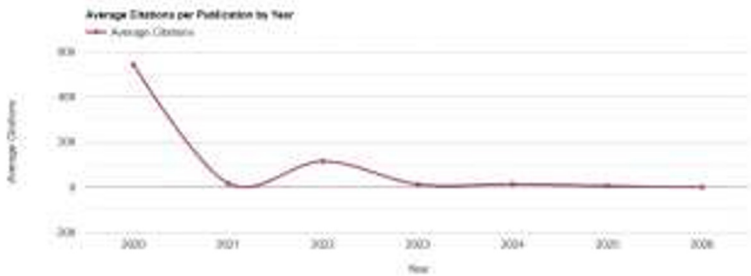


Figure 2. Citations per Publication by Year

The word cloud analysis of the literature shows a clear predominance of key concepts such as socioeconomic, status, health, disparities and determinants. This concentration highlights a strong academic interest in the study of structural inequalities in the world. The presence of methodological keywords such as "systematic," "review," and "analysis" in the current study indicates that macro-scale research is currently at the forefront of literature syntheses. In addition, terms such as "education," "income," and "food security" always appear adjacent to clinical terms like "cardiovascular," "depression," and "expectancy. This is a clear illustration of the impact of Socioeconomic status and the way it affects people's physical health, mental health and quality of life on a trans-border level.



Figure 3. Word cloud by Title

The descriptive coding indicates that health disparities represent the most frequently investigated topic, appearing in 48 of the 52 reviewed studies (92%). Educational attainment was discussed in 44 studies (85%), while income inequality appeared in 41 studies (78%). Governance and policy intervention were identified in 22 studies (42%), whereas digital divide issues were discussed in 20 studies (38%).

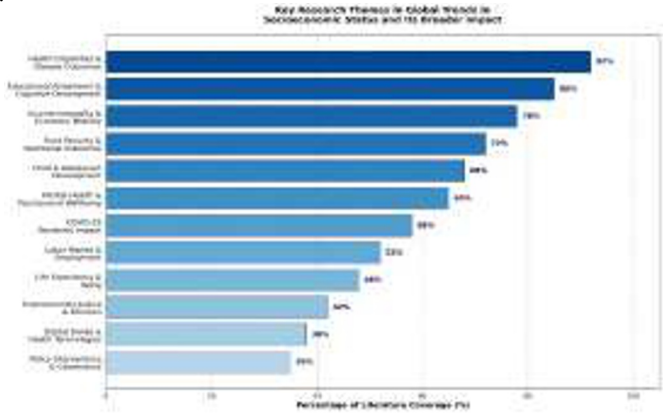


Figure 4. Key Research Themes in Global Trends in Socioeconomic Status and Its Broader Impact

4.2 What are the structural relationships between Socioeconomic status and macro-level health, educational, and economic outcomes? (RQ 2)

4.2.1 The Health Dimension: Structural Inequality, Multiplier Effects, and Cumulative Burden

Socioeconomic status (SES) is much more than just a demographic label. In public health research today, it is often viewed as a "fundamental cause" of disease. Essentially, this concept argues that people in higher SES brackets have flexible resources things like money, knowledge, social connections, and power. These tools help them dodge health risks or, if they do get sick, manage the fallout much better, regardless of the actual pathology involved. We see this play out clearly in what is known as the "social gradient in health." Simply put, as social standing goes up, sickness and death rates tend to go down. Take chronic illnesses like cancer, for example. Survival analyses show that in roughly 75% of studies, having a better education directly ties to a better chance of surviving. On the flip side, facing economic hardship like being unemployed or struggling in retirement pushes mortality risks up significantly (HR=1.86) [34], [35]. This gap only widens when we look at how social class overlaps with race and ethnicity. You can see this starkly in cardiovascular health. Because of structural roadblocks preventing access to standard preventive care, minority groups, including African Americans (AA) and Hispanics, face a stroke risk two to three times higher than that of non-Hispanic Whites [6], [7]. Ultimately, health inequity isn't just a matter of bad biology; it represents a systemic failure to distribute health-promoting resources fairly.

The fallout from being Socioeconomically disadvantaged rarely happens randomly. Instead, it builds up over a person's entire life, creating a multiplier effect that researchers often call allostatic load. Think about the daily grind of financial stress or chronic food insecurity. These are common realities in low-SES environments, acting as constant, toxic stressors that wear down both the body and the mind. For instance, teenagers dealing with food insecurity are two to three times more likely to show signs of anxiety and depression [36]. This mix of mental health struggles and poverty creates a vicious cycle, eventually taking a serious toll on physical vitality later in life. As people age, this lifetime of accumulated disadvantage shows up in stark numbers. Life expectancy at age 65 (LE65) differs by about 2.20 years for men and 2.04 years for women when comparing the highest and lowest social classes [37], [38]. This kind of structural inequality is especially dangerous when populations face macroeconomic crises. The COVID-19 pandemic was a perfect example, acting like a magnifying glass for the cracks in our global health systems. During the worst parts of the pandemic, the age-standardized mortality rate (ASMR) ratio between the poorest and wealthiest cities spiked to 1.49, with minority communities and vulnerable frontline workers taking the hardest hit [27], [39].

Looking at all this evidence really challenges the traditional biomedical way of thinking. It proves that clinical vulnerability is completely intertwined with Socioeconomic factors. If we view this through the lens of a "syndemic," it becomes clear that infectious diseases (like COVID-19) and non-communicable conditions (like heart disease or cancer) interact socially and biologically with poverty, multiplying the overall health burden. For policymakers, the takeaway

here is pretty urgent. Medical treatments alone are never going to be enough to close the survival gap. Healthcare systems need to start tracking Social Determinants of Health (SDOH) directly in clinical records and lean into models like social prescribing. Under this approach, a primary care facility wouldn't just hand out a prescription for medication; they would actively help connect at-risk patients with food programs, housing subsidies, or employment support. That is ultimately what it takes to break the chain of multiplier effects tied to low SES.

4.2.2 The Educational Dimension: Social Reproduction, Neurocognitive Development, and Labor Market Stratification

How Socioeconomic status (SES) interacts with education goes far beyond just who gets to attend the best schools. It actually points to a deep process of "biological embedding." In other words, early social disadvantage physically shapes the architecture of a child's developing brain. Looking through the lens of Cumulative Disadvantage theory, we see that large-scale economic shifts leave a direct and lasting mark on how children develop neurocognitively, linguistically, and socially [13], [40]. The numbers back this up: children growing up in low-SES households face a 1.92-fold higher risk for neurodevelopmental delays, alongside a 1.31-fold bump in the risk of socio-emotional setbacks [41]. A big part of why this happens comes down to the home environment. The quality of early nurturing explains roughly 19.4% of how SES impacts these developmental delays [42]. Essentially, intense financial strain and material lack drain a parent's capacity to offer the kind of responsive, cognitive stimulation a child desperately needs. This burden only gets heavier if the child is already dealing with innate biological vulnerabilities, like being born prematurely [43]. Some recent studies even suggest this cognitive divide isn't just about scoring lower or higher it is qualitative. Children from varying economic backgrounds might actually use entirely different neural pathways to tackle the exact same mental tasks.

All these early disadvantages don't just fade away; they become institutionalized and follow individuals directly into the workforce. This harsh reality pushes back against the old romantic idea that a college degree acts as the ultimate "great equalizer." Even with massive global expansions in university access, simply handing someone a diploma doesn't magically close the wealth gap. You can see why when applying Social Reproduction Theory, much like Bourdieu's ideas around capital. Wealthier families don't just buy academic degrees to build human capital. They pass down essential cultural and social assets think embedded professional networks and an intuitive grasp of corporate etiquette that give candidates a massive edge during the hiring process. The data points to a very real, structural wage penalty here. College grads from lower-income backgrounds tend to earn about \$500 less per quarter in their early careers compared to their wealthier peers. And this isn't just a brief hiccup while they find their footing. It is a deeply entrenched deficit that lasts for at least three years post-graduation (B. H. Kim, Bird, and Castleman 2022). In short, marginalized students often hit a pervasive "class ceiling" that actively limits the financial payoff of their education.

Bringing these pieces together helps bridge the gap between cognitive neuroscience and the sociology of education. What we end up seeing is that schools and job markets often act as echo chambers they amplify existing social divides rather than neutralizing them. For public policy,

the implications are clear and urgent. Trying to fix the problem solely at the end of the pipeline, like just handing out college scholarships, is never going to be enough unless we also address the upstream structural issues. We desperately need two-generation strategies that financially support early, high-quality caregiver-child interactions in at-risk households. At the same time, universities have to completely rethink how their career centers operate. Pushing students toward academic completion isn't enough anymore; schools need to deliberately build "social capital" programs specifically designed for low-SES individuals. Giving these students priority access to paid internships and dedicated industry mentors is arguably the most effective way to tear down the invisible walls they hit when transitioning into the professional world.

4.2.3 The Economic Dimension: The Human Capital Paradox, Cross-Class Connectivity, and Structural Financial Traps

Educational investment is the object of a modern macroeconomic discussion, which questions the classical rule that greater investment in education must come at the expense of inequality. The disparities that schools help to temporarily lessen in developing countries such as the ASEAN countries (with a per-capita GDP lower than USD 8,200) change once the pace of economic modernization increases. When skills become more and more advanced, and elite are increasingly restricted in an upper-middle class, human capital tools become mechanisms of long-term economic stratification, and there is an inverted U-curve of inequality [44]. In this case, access to elite skills which are acquired in the framework of higher education is limited to the upper middle class, leading to the generation of new inequalities through human capital tools.

In addition to formal education, structural mobility is largely determined by "bridging social capital" the vertical economic linkages that are created between classes. This is reflected in the evidence, as children from low-SES neighborhoods who grow up in economically mixed areas have a 20% income premium over children in neighborhoods where parents have high incomes, due in large part to their informal exposure to labor markets and professional norms [45]. At the same time, these communities are in segregated areas and suffer from a severe "poverty penalty" and pay a premium for basic survival. For example, in the U.S. 16 per cent of families are spending more than 6 per cent of their earnings just to afford enough energy to live by. This regressive financial burden disproportionately impacts Black, Hispanic, and Native American populations, and serves as another barrier to receiving green tech subsidy, while also locking them into inefficient housing environments [46].

The entrenched realities mean that conventional economic solutions, like one-off cash transfers, or school building, are an inadequate response. The process of dismantling structural inequality requires a change of policy at both a relational and spatial level, and not only a redistribution of wealth. Governance should shift to reform of zoning codes to encourage cross-class integration in neighborhoods and to take a proactive stance with targeted investments in infrastructure subsidies, including energy-efficiency retrofits in disadvantaged neighborhoods. When incorporated into the legislative process of cross-sectoral frameworks, such as those involving Social Determinants of Health (SDOH), policymakers can break out of a linear investment in human capital approach. This holistic strategy allows health, education and labour

markets to function in a clear and transparent way, that is, to respect the rights of minorities and to put an end to the poverty cycle in a systematic manner.

4.3. How Do Policy Interventions and Governance Structures Support the Reduction of Socioeconomic Disparities? (RQ3)

Any policy and governance changes that are effective in reducing Socioeconomic status (SES) disparities require a change of paradigm. There is a need to shift from individual behaviour interventions to multisectoral, integrated structural interventions. Social Determinants of Health (SDOH) residing entirely outside the traditional medical sector actually account for up to **90%** of an individual's health outcomes, serving as the primary drivers of widening structural inequality [20], [47]. Redistributive policies, such as cash transfers and basic income, are very sensitive to macroeconomic conditions [48], [49], and need to be complemented by structural changes in multiple environmental and social sectors. For instance, urban planning interventions such as housing support [48], [50], [51] and increased exposure to greenspaces have proven to trigger an equigenic effect. In these scenarios, elderly populations from low-SES backgrounds actually experience the most optimal leaps in life expectancy benefits [52]. Within the employment sector, structural workplace adaptations (including flexible working hours and ergonomic adjustments) can significantly extend the active working years of vulnerable employees [53]. Failing to design such holistic policies will only perpetuate "hidden inequalities" within public spaces, a reality starkly visible in the upper-class dominance of mass sports facility utilization [54]. This body of evidence firmly establishes that disparities cannot be resolved in isolation; they require public policies that actively fuse the social, economic, and health sectors [55], [56].

At the implementation level, the absolute success of these interventions' hinges on a governance structure that champions precision community-based approaches and deep sensitivity to local contexts. Grassroots interventions that empower local participation such as the "Promotora" model in minority communities [57] and parenting programs involving active father-child interaction have proven statistically successful in generating massive leaps in the cognitive, motor, and linguistic development of children from the lowest wealth quintiles [19]. These targeted approaches also prove critical when addressing social-class-based child malnutrition [58]. However, scaling this success requires a robust foundation of public governance and institutional efficiency, the effects of which are profoundly more significant in economically stable nations [59]. Contemporary governance also demands symmetrical coordination among actors at the territorial level to reduce both demographic and geographic vulnerabilities [60], [61]. Ultimately, given the extreme complexity of the SES architecture, governance structures must cultivate a culture of policy experimentation and systematic evaluation. This ensures that interventions precisely dismantle inequality without triggering unintended negative consequences [62], [63].

5 Conclusion

This study provides a comprehensive synthesis of recent research on socioeconomic status (SES) by integrating a Hybrid Systematic Literature Review with bibliometric analysis to examine global research trends and the broader impacts of SES on health, education, and economic mobility. The findings demonstrate that SES should be understood as a multidimensional structural determinant rather than merely an indicator of income or occupation, as it influences opportunities and life outcomes through interconnected social, economic, and institutional processes. The review further reveals that existing research remains concentrated on health and educational outcomes, while governance, policy implementation, and institutional effectiveness receive comparatively limited attention, particularly in developing countries. The primary novelty of this study lies in combining bibliometric mapping with thematic synthesis to provide an integrated perspective that connects research trends with structural evidence, thereby offering a more comprehensive understanding of SES than previous reviews that examined these dimensions separately.

The findings highlight that reducing socioeconomic inequality requires coordinated policies that extend beyond individual behavioural interventions or sector-specific programmes. Sustainable progress depends on integrated governance that strengthens social protection, equitable access to education and healthcare, inclusive economic opportunities, and collaboration across policy sectors. By identifying both the dominant research themes and the underexplored areas within the global SES literature, this study offers a foundation for future research and evidence-informed policymaking. Future studies should expand the geographical scope of analysis by incorporating evidence from low- and middle-income countries and evaluating how different governance models and policy interventions influence socioeconomic outcomes across diverse institutional contexts.

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