# Social Exclusion and Social Support in Rural Canada

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## ABSTRACT

The availability of appropriate social support is critical for social inclusion. This is most important under conditions of change and stress. In order to ensure such support, therefore, we need to understand the nature of social support in rural areas, how it is used, and the conditions that facilitate or inhibit its use. This paper provides theoretical and empirical contributions to understanding those processes of social inclusion and exclusion as they are reflected in social support. Using a theoretical framework rooted in social relations and data from 1995 rural households in 20 field sites from across Canada, we examine various types of social support that are used under conditions of change, the characteristics of the households using them, and the community-level contexts that condition their use. Both policy and research implications are drawn from these results.

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# Social Exclusion and Social Support in Rural Canada[1]

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## 1. Introduction

Rural Canada has undergone significant changes over the last 50 years. In the process, a new realignment of winners and losers has emerged – creating new challenges for those of us concerned about equity, social exclusion, and the future of rural people. In order to prepare for that future, it is necessary to understand the processes that have brought us here, the consequences for rural people, and the options that have been created by this realignment.

We take an approach that reflects the multidimentional, dynamic, multi-leveled, and relational nature of social exclusion (Shucksmith and Philip 2000) and grounds the analysis in concrete choices and challenges. We argue that social inclusion and exclusion analysis should focus on the processes by which they occur rather than the outcomes. We also propose that these processes are rooted in the social relations that legitimate and provide access to resources and services. We propose a classification of four basic systems of social relations that conditiont his access and provide evidence regarding how they are distributed in rural Canada. To do this, we focus on the use of social support by rural households, the types of households making use of these supports, and the

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contextual conditions structuring this use. These results are used to justify the need for intensive case studies of social inclusion and exclusion processes, but only within a research design that permits systematic comparisons across different contexts. If successful, this approach will not only corroborate the perspectives developed regarding social exclusion, but it will serve to guide practical policy proposals for dealing with the various challenges relating to social exclusion and inclusion.

## 2. Theoretical Framework

Social inclusion and exclusion is about the ways in which people, groups, organizations, or societies gain access or are constrained from access to resources and services. It addresses the question: Are people excluded from getting what they need? If they are unable to gain access to the resources, institutions, social relations, and services they require to function in society, they face social exclusion as it has been traditionally articulated.

This exclusion can occur in a number of ways. It may occur by restricting or redirecting resources or services to particular people or groups, and away from others. It may also occur through the reorganization of rights or entitlements to exclude some and include others. In all cases, however, the processes are rooted in social relations and the ways in which these social relations are organized and legitimated.

Social scientists have for a long time recognized the ways in which access to and the distribution of resources and services follow socially structured patterns. In one case it

might be by trading goods and services in an open market, in another, it may be through allocations within an hierarchy, while in a third, it might be through equal distribution according to some ascribed characteristic or identity. In all cases, however, this distribution must be legitimized and supported by norms and entitlements that are commonly accepted, and either formally or informally enforced. Typically, these norms and entitlements are also shared by others who are not directly related in the exchange of distribution. To understand social inclusion and exclusion, therefore, we must focus on the structures of these relations, how they are legitimated, and how they function.

These systems of relations do not exist in a vacuum. They must be constantly maintained and supported, even as they undergo change and adaptation to the broader contexts in which they exist. Our analysis, therefore, must include an examination of the social, economic, political, and cultural contexts in which the relations occur and build upon our undertanding of the ways in which those contexts affect the nature and relations between the systems of inclusion and exclusion.

We hope to contribute to this effort at understanding by focusing on the ways in which people make use of resources, assets, and social supports to deal with the stresses they face. The analysis is heavily empirical at this point since we seek to determine how people cope and how this coping is conditioned by the circumstances in which they live. The empirical work is supported, however, by a framework on social exclusion that is rooted in social relations (Reimer 2004).

In this framework we propose that there are four fundamental types of social relational systems through which support and distribution occur: market, bureaucratic, associative, and communal. Being able to operate in one of more of these types of relations is, therefore, critical to having access to resources and services as well as to the systems of legitimation that support entitlements. Since each of these systems is in turn organized and supported by more general social structures and processes, the framework provides a basis for understanding how these general changes might alter the conditions, people, and groups who are excluded or included.

Market relations are those based on the exchange of goods and services within a relatively free and information-rich context. The classical economic market, for example, is envisaged as individuals bringing surplus goods, searching for those things they desire, and striking an exchange that is mutually acceptable (Swedberg 1991:21). This may take the form of barter, where goods or services are exchanged for other goods or services, or it may involve the mediation of money, where goods and services are exchanged with the help of currency. To exchange in this way, people must have control over some goods or services, be willing and able to equate them to a common standard or currency, and be confident that the exchange will be completed in a dependable manner. Distribution within this system is primarily based on principles articulated by classical economics for free markets: supply and demand, pricing, transaction costs, and information flow. Social inclusion within this system requires access to tradeable goods or services, adequate information about markets and prices, good negotiation skills, and a high level of mobility.

Bureaucratic relations are those based on a rationalized division of labour and the structuring of authority through general principles and rules. They are the 'rational-legal' relationships originally explored by Weber: impersonal and formal, with the distribution of resources based on status positions rather than productivity (Gerth, H. H. and Mills, C. Wright 1967:196f). Individuals relate to each other through the roles they are assigned rather than individual characteristics. Distribution within this type of relationship is primarily based on the allocation of rights and entitlements through the application of general principles or policies articulated in formal charters or legal documents. As with any formal system, they are usually backed up with law and access to enforcement related to law.

At an institutional level, social inclusion based on bureaucratic relations requires membership in one of the status groups or roles that are identified by an institution. As a result, the charters and by-laws of government and corporate organizations are key points of reference for identifying the allocation of such rights and entitlements. Social inclusion, therefore, depends on the ways in which the rights are institutionalized, the capacity of institutions to enforce those rights, either formally or informally (Stinchcombe, Arthur L. 1968:149ff), and the ability of individuals or groups to articulate their interests in terms of general rights and forms of organization.

At a more individual level, social inclusion requires individuals and groups to meet the personal and collective conditions of these formal structures. This includes the cognitive ability to operate in terms of roles and generally applied principles, the facility to frame

individual and collective interests in terms of those principles, and sensitivity to the manner by which formal organizations operate – even at an informal level.

Associative relations are primarily based on shared interests. Individuals come together in order to accomplish goals and express concerns that are common to the group (Olson, Mancur 1977; Gunn, Christopher and Gunn, Hazel Dayton 1991:156). Clubs, social action groups, internet chat rooms, spectator events, hobby groups, and food banks are examples of these relations. They are often characterized by focused objectives, informal structures, and short-term lifespan, but they can address more long-term objectives by being transformed into more formal structures.

Social exclusion reflected in associative relations is, therefore, closely related to the objectives and interests of groups. Since they tend to be focused, associative relations are open to exclusion on a wide variety of bases – both formal and informal. In Canada, the potential for unacceptable exclusion is often minimized through the imposition of bureaucratic-based rights and entitlements enforced by the state. Inclusion based on associative relations is likely to be highest where common interests are shared, information about others' interests is easily available, where the symbols of commitment to the goals are clear, and where there is considerable contribution to the goals on the part of members. The emergence of charismatic leadership and the availability of communication infrastructure are likely to facilitate this process.

Communal relations are based on strongly shared identity. Membership and collective action is often tied to ascribed characteristics of birth, ethnicity, or location (Fiske, Alan Page 1991:258ff; Benokraitis, Nijole V. 1997). Family, friendship, gang, and clan relationships are common examples of such relations (Whyte, William F. 1993). The rights and obligations of members are strongly associated with this identity, largely developed and maintained by custom and complex systems of reciprocal exchanges (Hamilton and Biggart 1992). Goods or services are usually distributed to members according to custom, age, gender, or heredity rather than general principle or ability to pay.

Communal relations require a high level of trust and loyalty, especially where exchanges are long term or the 'objects' of exchange are unclear. For that reason, they are often associated with strong markers of inclusion and exclusion such as rituals, symbols, rites of passage, and ascribed characteristics (Cooley, Charles Horton 1922).

Each type of social relation operates with considerable internal coherence. Norms of behaviour, values, perspectives, and ways of operating surround each of them, legitimize specific actions and justify particular resource distributions. In some cases, these norms become formalized in law with associated methods of enforcement. As a result, people come to depend on the secure operation of the system for access to resources and services – often, but not always reflected in the trust they attribute to the relations (Stolle 2003). Threats to the operation of the system will activate resistance and those who benefit from

it are likely to champion its survival and expansion. In this respect it can become self-regulating in a weak or strong sense.

On the other hand, each type of relating is not isolated from the others (Oughton et al. 2003). All four of them usually operate in a specific situation, although only one or two may be dominant. This may be seen in an environmental action group such as Greenpeace, where associative relations became transformed into bureaucratic ones as the members reorganized themselves into a formal organization with the norms and regulations to enforce them. In this case, the bureaucratic and associative relations reinforced one another.

Mutual enhancement between these types of relations is not always assured, however, since there are many points where their basic structures and processes differ (Coase 1991). Those looking to recruit members for voluntary associations are often confronted with supporters who refuse to participate in the more bureaucratic aspects of the association. People are often enthusiastic about baseball, card-playing, or meal-preparation in a voluntary group, but quickly lose interest as demands are made on them to prepare a grant proposal or a statement justifying their financial expenditure. In these cases, the motivation and norms surrounding the associative relations are undermined by the requirements of bureaucratic-based relations.

Social inclusion and exclusion are mediated by the interplay between all four of these types of relations. At an individual level, access to resources and services associated with

each type is predicated on ones access to the appropriate type of social relations and one ability to function well within them. As banking bureaucracies moved from tellers to ATMs, for example, the heavier reliance on bureaucratic-based relations has created significant obstacles to those unfamiliar with the technology and isolated from people who could help in the transformation. Without consistent aid, for example, my parents would continue to pay higher administrative costs and face limited access to their banking services as a result of this organizational change.

Similar processes occur at a collective or community level. Rural communities have had to become proficient at grant-writing, business-planning, and community-development techniques in order to get access to the resources and services of contemporary public and private sector institutions. Those that are unable to do so, because of isolation, size, human capital, or social capital, will remain relatively excluded unless the dominance of market and bureaucratic types of relations declines.

This approach provides us with a framework to link social inclusion and exclusion processes at the individual and local levels to their more general contexts. We are thereby able to see how changes in this more general context might affect the types of people and circumstances by which exclusion changes. This can provide a basis for policy-makers to anticipate some of the consequences to their programs under different conditions and for communities to assess the implications of their options for social inclusion and exclusion.

In this paper we will focus on the use of social supports as a means to understand inclusion and exclusion processes. Although social support use reflects only a part of the way in which inclusion and exclusion occurs, it is particularly critical since it is a key way in which access to resources or services are enhanced or limited. It is also a valuable focus because of the wide range of ways in which support might occur. This allows us to examine that shifts in sources for social support related to the nature of the need, the type of person requiring support, and the context in which it occurs.

Social support refers to the ways in which people, households, or other groups seek help when they organize their livelihoods or deal with crises. As a social option, it is rooted in the relations that connect people to one another in various ways. If people are able to draw upon the resources and services of others, we consider them included and if they are unable to access these resources or services they face a form of social exclusion. This inability to access resources or services may occur in three main ways. First, they may not be aware of the services or resources that can help them deal with the challenges they face. Second, they may not possess the skills or knowledge necessary to access the resources. This may take the form of technical skills or more amorphous social or cultural skills that create a barrier to participation. The types of skills associated with each of the four types of social relations are good examples of what is meant here. Third, people may be excluded due to the rights and entitlements associated with particular resources and services. These rights may be formally identified as in the case of the age restrictions applied to pension assistance, or they may be indirectly imposed through the

organization of the resources (e.g. air transportation only to major urban centres, no day care for the poor) or discriminatory practices based on prejudice.

**3. The Changing Rural Context in Canada**

The changes in rural Canada have had significant impacts on the manifestations of all four types of social relations. Shucksmith and Philip (2000) identify numerous examples from Britain – highlighting how labour markets, housing, services, state ideology, corporatism, community development, migration, and social support networks have all been affected. Meert (2000) describes how these changes have had profound effects on labour and food markets in rural areas while occuring at the same time as a reduction of the availability of governmental and reciprocal supports. The changing labour markets have resulted in structural unemployment, the globalization of food markets has caused declining food prices and the inability for farmers to survive, cutbacks to social welfare programs have decreased their accessibility, and changes in the traditional family structure has caused shifts in communal supports. Dewilde (2003) describes how this "de-institutionalization of the life course", largely caused by the changes in resources distribution from labour and family changes, is creating new social risks. She states that with the reduction in the social welfare state and its capacity to help mitigate the risks, vulnerable groups face new risks of social exclusion and poverty.

The Canadian situation parallels most of these issues. The massive outmigration of populations from resource-based communities since the 1940s has undermined the pool of people for voluntary organizations and shifted the balance of power from those who

where skilled in associative and communal relations to those who work well with bureaucratic and market-based ones. At the same time, the withdrawal of the state from provision of services has placed a greater burden on local associative and communal supports. The concentration of corporate organization and power has even reduced the ability of local people to control their futures through bureaucratic and market relations since the policies guiding those organizations are most often formulated in distant urban centres with little sensitivity to local conditions or interests.

Rural communities often face particular difficulties with respect to these types of changes (Meert 2000). Traditionally, their social networks have been deeply embedded in associative and communal types of relations. The distribution of resources, norms of congeniality, expectations for appropriate behaviour, and interpersonal norms have reflected the primacy of these relations – where status is more often attributed to helping neighbours than closing a lucrative deal, or occupying a public position is respected so long as it doesn't mean treating your community members on the basis of narrowly defined roles. These types of self-organization have been very effective for small communities up to now.

In contemporary society, however, associative and communal types of relations are less effective for accessing resources. It is now market and bureaucratic relations that have become dominant. Since rural people are required to compete in this context, they are disadvantaged so long as they fail to develop agility with each type of social relation. The penalty is to be left out of the allocation of resources and services. Our field sites have

reflected this in the gradual loss of control over their local assets to bureaucracies (often external) that organize their social capital and organizational structures in a manner excludes local interests, family allegiance, or traditional (often local) obligations.

These changing conditions have meant that the structures and processes of social support have been altered. The assets, organizations, networks, and options to which rural people can turn are now quite different than in the past, and as a result, the skills required of potential users have changed. The traditional skills associated with primary industries have largely been replaced by those in the service sector, getting access to banking opportunities now requires facility with ATMs and menu-driven answering machines, health care requires registration and forms that are intimidating to many, and even participation in voluntary groups often requires an awareness of grantsmanship and familiarity with rules of order. Not all people are able to accommodate these changing demands.

Our objective is to understand the ways in which these general changes affect the organization of social support in rural areas. To this end, we will focus on rural households and examine their responses to recent changes – inquiring specifically into the people and groups to whom they turned for support when it was needed. Although not longitudinal in nature, this data will provide us with an indication of the typical options available to different types of people and households, the relative frequency with which they are used, and an evaluation of their effectiveness. Since it focuses on the choices and

strategies adopted, it introduces a dynamic aspect into the analysis which is often missed by other indicators of exclusion.

**4. The Data and Approach**

Our analysis makes use of interviews conducted in 1995 rural households in 20 field sites from across Canada.[2] As part of these interviews, respondents were asked to identify the most important change that had occurred in their household over the last year. Follow-up questions were asked to explore the ways in which the household had dealt with that change, the success of their response, and the nature of the 'trade-offs' they had to make in order to deal with the change.[3] This series of questions yielded a rich source of information regarding the types of social support they sought and the outcomes of their strategies.

In addition to the information collected from households, we had data regarding the characteristics of the field site in which they lived. This included information regarding the businesses, social services, voluntary organizations, and community activities within the sites, along with historical records regarding the major events and changes affecting the region. This will allow us to examine the role of contextual features on the options chosen by households to deal with their major changes.

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[2] Details on the sample frame and selection of households can be found in Reimer (2002)

[3] Copies of the instrument used can be found via: http://nre.concordia.ca

Finally, each of the sites was selected to permit comparisons on five key dimensions linking them to broader processes and characteristics. We are therefore able to compare households in sites that are well connected to the global economy with those that are relatively isolated from these global forces. Similarly, we can compare those that are in sites with relatively stable economies with those in which the economy is uncertain; those that are nearby major urban centres with those farther away; those with relatively high levels of institutional capacity with those having relatively low levels; and those that are leading on a number of socio-economic indicators with those that are lagging on those same indicators.

These databases provide information allowing us to explore the use of social support at three major levels: the household, the site, and the broader site context. By doing so, we wish to identify not only the characteristics of those making use of various types of support, but to explore some of the contextual circumstances that may condition their choices and the processes underlying them. We will do this using the following 4 major questions.

- What are the major sources of support sought by rural people and households?
- What types of people or households use what types of support?
- How satisfactory are the various types of support used?
- How are the uses and outcomes of support affected by the contextual conditions of the households?

The interpretation of these data is not straightforward, however. Making use of particular social supports can be seen as an indication of social inclusion, but not if it provides little help in return. Similarly, those who do not seek help may do so for many reasons, including lack of information about their opportunities, inadequate transportation, or previous exclusion experiences. Each of these reflect different aspects of social exclusion. Our analysis at this stage will not be able to take these possibilities into account, since the nature of the data is inadequate for the detail of intentionality information required. For this, much more extensive case analysis is required. However, our analysis will be able to suggest directions for that more detailed case study work – by identifying many of the key issues for attention and developing the case for a systematic and comparative framework that goes far beyond the traditional case study analysis.

## 5. Results

### 5.1. Family and friends are crucial supports

Of the 1995 household members interviewed, 70% of them (1405) reported information about the most significant change that had affected them over the last year. This provides a substantial basis from which to conduct our analysis.

The types of changes were open-ended within the interview. Respondents were able to identify many different types of changes, but were then asked to identify from their list, which of the change had the greatest impact. These responses were subsequently coded into 4 categories for analysis: *financial or income* changes (including education or legal), *health*-related changes (including parenting and home care), changes in *relationships*

(living arrangements or personal achievements), and *other* types of changes. Health (39%) and financial (38%) changes were the most frequently mentioned in the overall sample. Thirteen percent of them were about Relationships and 11% fell in the Other category.

Once the most important change was identified, we asked for the major sources of support sought by the households in the face of this change. Once again, the respondents were free to answer as many sources as they wished. From this information, we identified up to ten sources for our subsequent analysis since this captured almost all of the cases. These various sources were then classified into the four types of relations that they represent. Thus, for example, employers, financial advisors, businesses, or accountants were considered to be supports based on market-types of relations. Doctors, lawyers, government offices or employees, and teachers were considered to be based on bureaucratic-types of relations. Religious, volunteer, or education organizations were considered associative-based, while family, friends, and neighbours were considered to be communal-based.

Most often, people drew their social support from communal-based types of relations (60% of those households which sought support). Bureaucratic-related supports were the second most frequent (50%), with market (22%), and associative (14%) following. Of course, many times these various types of support were used in combination – itself an important focus of attention, since the combination of the various types of support is frequently a crucial element of the success in accessing support. Access to bureaucratic

supports in the form of hospital services, often requires communal support as found in family and friends, for example (Statistics Canada 1991). In fact, the most frequent use of supports are in communal and bureaucratic-based combinations (20% of households which sought support), followed by communal alone (15%), bureaucratic alone (10%), market-bureaucratic-communal combinations (7%), and bureaucratic-associative-communal combinations (7%).

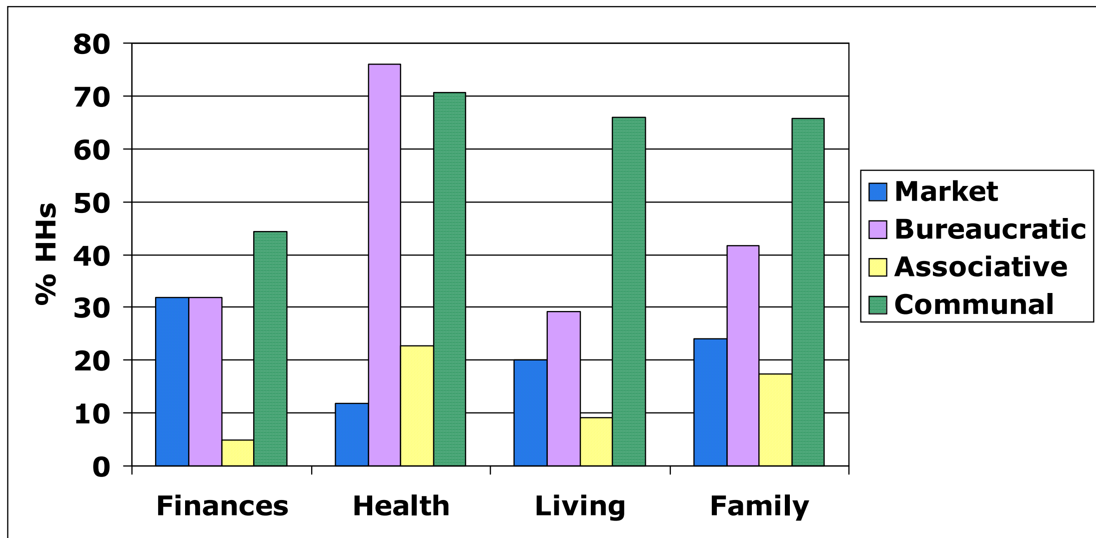
These data reinforce the key role of family and close friends for the social support of rural people and households. As we suspect, communal-related supports are also key elements in providing access to bureaucratic, market, and associative types of relations and the assets they provide. It suggests that social support policy directed solely to the building of bureaucratic institutions, or relying on bureaucratic channels of distribution will provide only a limited solution to social exclusion unless the communal types of relations support them are also facilitated.

5.2. The type of change matters

Although communal-based types of support are the most frequently used, there is variation in the other types according to the nature of the change which the household has faced. Figure 1 illustrates that for financial changes, bureaucratic and market-based supports follow communal ones, with associative-based supports playing a relatively minor role. As one might expect in a country with a relatively strong medicare system, bureaucratic-based supports are extremely important for health changes, whereas both associative and market-based supports are less critical. For changes in living

arrangements and family issues, communal-based relations continue to play and important role along with bureaucratic-based ones with market and associative-based sources making less extensive contributions.

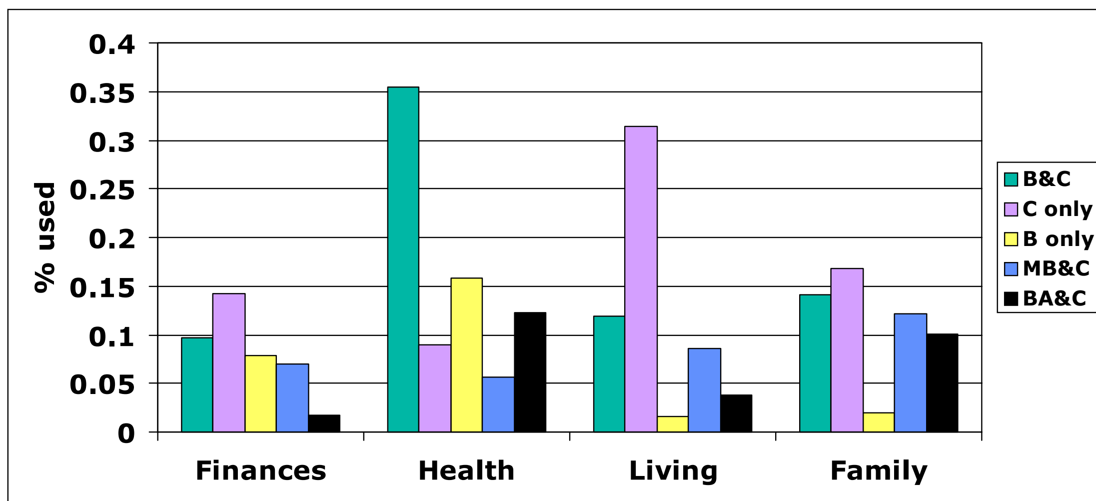
**Figure 1**: Use of social supports by type of change in household (1405 HHs)




By examining the combinations in which these various supports are used, a more complex picture emerges – but one that is important to explore for its theoretical and policy implications. Figure 2 provides the same type of information as Figure 1, however, it identifies the ways in which the most frequently used types of support are combined. From Figure 1, for example, we see that communal-based supports are most often used for financial changes. Overall, we find that these communal-based supports are most often used in combination with bureaucratic-based supports (20%), next most often on their own (15%), but sometimes with both bureaucratic and market-based supports (7%) and with bureaucratic and associative-based supports (7%). The patterns are different when we examine each type of change, however (cf. Figure 2). For financial changes, communal-based supports are most often used on their own, but for

health changes, they are most often used in combination with bureaucratic ones. For both living and other changes, communal-based relations alone provide a high percentage of support, but combinations with bureaucratic and associative-based ones remain important.

**Figure 2**: Use of supports by combinations and types of changes (1405 HHs)

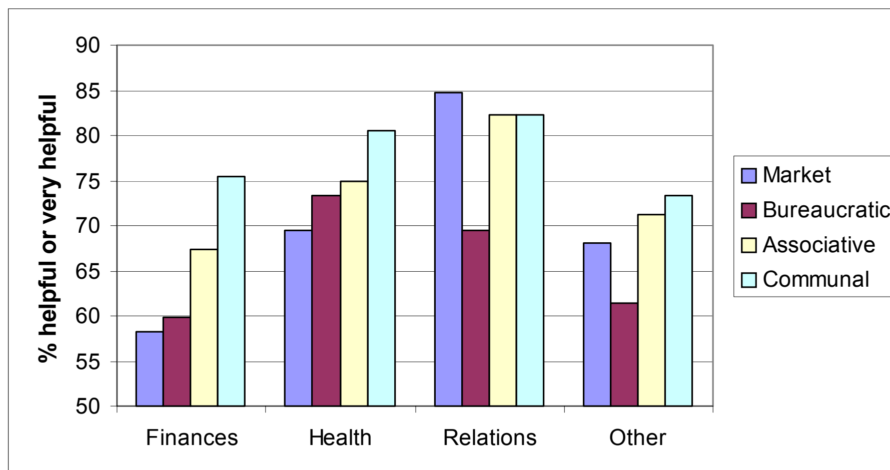



These results reinforce an approach to social support that is multidimensional. It suggests that addressing social support and inclusion by augmenting bureaucratic, associative, or market-oriented infrastructure alone will provide only a partial solution to the problem. Instead, each of these approaches should be seen as part of a package: one in which support for communal-based relations is critical. They also imply that those with weak communal supports are likely to face social exclusion when faced with all types of household changes.

5.3. Evaluating social support

Using various types of social support may not always be helpful for households dealing with changes. For that reason, we asked our respondents to evaluate the various strategies they used with respect to whether they were helpful or not. Figure 3 provides the results for both the types of changes and types of support. It confirms that not only are communal-based relations the most likely to be used as social supports, but they are also likely to be the most helpful – except in the case of changes in living or personal relations. Under these circumstances, market-based supports have the highest level of helpful outcomes. These results also make clear that bureaucratic-based supports, although often used, are less helpful than other types, especially with finances and 'other' types of changes. Associative-based supports, however, appear to have relatively high levels of positive evaluations in spite of that fact they are seldom used.

**Figure 3**: % helpful or very helpful by type of change and type of support.




A more detail examination of these evaluations reveals that combining the various types of social support provides higher evaluations than using each category alone. For

example, strategies using communal relations alone yielded an average percentage of 71% for helpful or very helpful. However, when combined with bureaucratic-based supports or market and bureaucratic-based supports, the evaluation of communal supports increased to 79% and 82% helpful or very helpful respectively. Once again, a multidimensional approach to social support provision appears to be the most promising.

Some of the major impacts of changes are not directly associated with the changes themselves, or even the strategies adopted to deal with them. Instead, those impacts are felt in the various tradeoffs that must be made to accommodate the changes. Illness, for example, may be successfully dealt with by using family members for home care. However, to make this possible, someone may have to take leave of their employment, travel longer distances, or curtail their voluntary activities in the community. It is often in these tradeoffs, that we see some of the gender or rural inequities relating to social support (Statistics Canada 1991). Since these accommodations are not reflected in most of the data on social support, we included a question in our interviews regarding the types of tradeoffs that had to be made in the household along with an evaluation of those tradeoffs.[4]

In general, respondents reported that the most negative tradeoffs were felt as a result of health and home-care types of changes. These tradeoffs were most likely to affect wealth,

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[4] We asked whether the change with the most impact was making any of the following aspects more positive, negative, or no different for the household: wealth, family, friends, personal safety and security, good physical health, work success, or mental well being.

work, health, and mental well-being. The highest levels of positive tradeoffs were felt as a result of personal achievement, employment, or living arrangements. They affected most of the aspects listed in our interviews. We also found that the type of tradeoff (positive or negative) also varied by the relationship between the nature of the change and the type of social support used. For example, using bureaucratic supports for income, home care, legal, and living changes is more likely to have negative tradeoffs on wealth, employment, and friends whereas using bureaucratic-based supports for family changes is likely to have positive changes for employment tradeoffs. Using market-based supports for legal, family, parenting, home care, or educational changes, on the other hand, is more likely to have positive impacts for wealth and employment tradeoffs. Using associative-based supports for income, employment, home care, educational of family changes is more likely to have positive tradeoffs on wealth and employment and using communal-based supports for legal changes is more likely to have negative tradeoffs on employment.

These results reinforce the important point that processes of social support, and the social inclusion they imply, are complicated, multidimensional features of social life. To treat social exclusion from a unidimensional point of view, therefore, is likely to gloss over important qualifications and conditions that may undermine the very objectives that we wish to achieve.

More specifically, they suggest that successful social support depends to some extent on the nature of the change experienced. Social support for relational and health changes, for

example, appear to bring the greatest levels of satisfaction in general. These differences can be offset by the type of support provided, however – communal and associative supports appear particularly helpful, for example. These are precisely the types of relations most at risk in the new economy.

### 5.4. Examining vulnerable people

The complexity of social support processes are further illustrated when we consider the types of individuals and households involved. Our data allows us to consider many of the key characteristics mentioned in the literature that are associated with special challenges in a rural context. Age, gender, employment, income, housing, health, family structure, ethnicity, length of time in the community, and specially challenged populations have all been shown to be particularly vulnerable to exclusion in rural areas (Shucksmith and Philip 2000). Our analysis begins with an examination of most of these types of people, but with particular attention to the four types of relations to which they turn for support.

Since we expect these household characteristics to be related, simple bivariate analysis is likely to be misleading. As a result, we have employed logistic regression analysis to examine the relative strengths of the relationships between these characteristics and the use of various types of social support. Table 1 provide the results of this analysis using indicators for all of the variables above (with the exception of ethnicity, which was not available).

**Table 1**: Odds ratios and logistic regression coefficients for significant variables relating to types of social support (NRE Household survey, N = 1210) (p<.05 in all cases)[5]

| | Type of Support Used | | | |
|---|---|---|---|---|
| | **Market** odds ratio (B) | **Bureau.** odds ratio (B) | **Assoc.** odds ratio (B) | **Commun.** odds ratio (B) |
| Nagelkerke $R^2$ | .09 | .08 | .04 | .03 |
| Constant | .13 (-2.02) | .76 (-.28)ns | .05 (-3.05) | 1.68 (.52) |
| HH includes 18-24 yr old | .62 (-.48) | | | |
| HH includes 35-49 yr old | | | | .74 (-.30 |
| HH includes 50-64 yr old | | 1.27 (.24) | | .76 (-.28) |
| HH includes 65+ yr old | .47 (-.75) | 1.96 (.67) | | |
| Female single parent | | 2.36 (.86) | | 4.47 (1.50) |
| < High school (reference category) | | | | |
| High school completion | 1.28 (.25)ns | | 1.62 (.49)ns | |
| Post-secondary (non-univ.) | 1.95 (.67) | | 2.12 (.75) | |
| University | 1.69 (.52) | | 2.04 (.71) | |
| Female only household | | .83 (-.19)ns | | |
| Male only household | | .50 (-.69) | | |
| At least one person in past primary employment | 2.18 (.78) | .49 (-.72) | | .45 (-.80) |
| At least 1 HH member employed FT or PT | 1.96 (.67) | .66 (-.42) | | |
| Median HH income <$20K | | 1.63 (.49) | 2.93 (1.07) | |
| Median income $20-29K | | 1.50 (.41) | 1.72 (.54)ns | |
| Median income $30-39K | | 2.16 (.77) | 2.11 (.75) | |
| Median income $40-59K | | 1.47 (.38) | 1.50 (.41)ns | |

[5] These regression equations explain only a small percentage of the variation in the type of support. This is to be expected because of the complexity of the social support processes. However, we are still able to learn with confidence from the coefficients since they reflect impacts using a relatively large sample.

| | Type of Support Used | | | |
|---|---|---|---|---|
| | **Market** odds ratio (B) | **Bureau.** odds ratio (B) | **Assoc.** odds ratio (B) | **Commun.** odds ratio (B) |
| Median income $60-79K | | 1.57 (.45) | 1.55 (.44)ns | |
| Median income $80K+ (reference) | | | | |
| Home care needed in HH | | | 1.80 (.59) | |
| Newcomer (reference category) | | | | |
| Lived all life in site | | | | 1.13 (.12)ns |
| Returnee to site | | | | 1.45 (.37) |

ns = not significant

Table 1 suggests that age, gender, single parent status, education, employment, income, and health all show important relationships to the use of social support. For example, the odds ratios under the first column indicate that the odds for using market-based social supports in households with at least one 18 to 24 year-old are .62 the level of other households when all the other variables are controlled. Similarly, households with at least one 65 or older person are .47 the odds of others. By comparison, the odds for using market-based social supports in households with at least one person who was employed in primary production in the past are 2.18 times those in other households. On the surface, it implies that these types of households are in greater need, have easier access by virtue of their conditions or skills, or face fewer barriers due to prejudice or discrimination. In most cases, it is likely to be some combination of these factors.

By breaking out the types of social support, we gain considerable insight regarding the nature of this support. Single mothers, for example, draw most of their support from bureaucratic and communal types of social relations. Educated people are more likely to use market-based and associative-based supports, and households with employed people more likely use market-based supports and are less likely to use bureaucratic-based ones.

Five other characteristics also emerge as important. Young people (18-24 years old) are unlikely to use market-based forms of support. Since this is not compensated for by the use of other forms of support, this may indicate a form of isolation that needs particular attention. Second, we find that households with people who were formerly employed in primary industries are also likely to turn to market-based supports and unlikely to use communal ones. Similarly, households with at least one employed person are likely to make use of market-based social supports but unlikely to use bureaucratic and communal-based ones. These are examples where one type of support may compensate for the lack of access or inability to make use of another. Households with some home care demands do not show this pattern of compensation. They are likely to turn to associative-based social supports. Finally, those who have returned to the place they previously lived are more likely to make use of communal-based supports that those who are recent residents.

Considering each type of social support on its own also highlights a number of other household characteristics that are glossed over by the summated index. Each type of social support, for example, is related to different combinations of household

characteristics. Market-based social support is used more often by households containing people with higher levels of education,  employed persons, and those who were previously employed in primary industries. On the other hand, it is used less by those with young and older people. Bureaucratic-based support is important for the elderly, single mothers, the unemployed, and those in the mid and lower income ranges. They are less likely to be used by those in male-only households and those who are employed. Associative-based relations are more often used by those with higher education, mid and lower incomes, and those responsible for home care. Finally, communal-based supports are especially used by single mothers and returnees, but unlikely to be used by middle-aged people and those who were previously employed in the primary sector.

These results provide important insights into the inclusion and exclusion processes associated with vulnerable groups as identified in the literature. The elderly, for example, tend to be excluded from market-based supports, relying instead on bureaucratic-based supports. Young adults find themselves in a similar position. Single mothers are primarily dependent on bureaucratic and communal-based supports, with little special contribution from market and associative sources. Those with little formal education appear largely excluded from market and associative-based supports. Those with the lowest levels of income are most dependent on bureaucratic and associative-based supports. The unemployed are particularly dependent on bureaucratic-based supports, and those facing poor health conditions in their household are dependent on associative-based supports.

Another way to identify vulnerable populations is to consider the evaluations of social supports that are used by the respondents. We have done this by calculating the percentage of the various types of support which the respondents considered to be 'not helpful' and 'not very helpful'. Table 2 provides the results of regression analysis of this data.

**Table 2**: Regression coefficients for significant variables relating to negative evaluation of social supports - with context variables (NRE Household survey, 2001) ($p<.05$ in all cases)

| | **Type of Support Evaluated** | | | |
|---|---|---|---|---|
| | **Market**<br>B<br>(Beta)<br>N=254 | **Bureau.**<br>B<br>(Beta)<br>N=554 | **Assoc.**<br>B<br>(Beta)<br>N=138 | **Commun.**<br>B<br>(Beta)<br>N=667 |
| Adjusted $R^2$ | .07 | .03 | .14 | .01 |
| Constant | 12.96 | 3.80 | 2.38 | 4.25 |
| HH includes 13-19 yr old | 8.41 (.14) | 9.62 | | |
| HH includes 20-34 yr old | | | | -2.99 (-.09) |
| HH includes 35-49 yr old | | | 12.43 (.24) | |
| Average HH income | .00 (.14) | | | |
| Below Low Income Cutoff (est.) | 9.10 (.17) | | | |
| Male single parent | | | 85.19 (.28) | |
| Home care needed in HH | | | | 3.23 (.08) |
| Number of vehicles | -11.05 (-.21) | | | |
| Exposure to global economy | | 7.77 (.14) | | |
| Population | | .00 (.11) | | |

These results introduce some special considerations for vulnerability that are not highlighted from the previous data regarding social supports used. For example,

households with teenage children are more likely to find market and bureaucratic social supports to be not helpful. For the poorest households, market-based supports are not helpful, but once other conditions are controlled, we find an increase in dissatisfaction as incomes get higher. Accessibility to vehicles is clearly an important factor in the evaluation of market-based supports – since households with such transportation are more likly to express satisfaction with the outcomes of these types of support. Associative-based social supports appear non-helpful to households with  35-49 year olds and male single parents and although communal-based supports are highly ranked in general, they appear to be not particularly helpful for households with home care needs and those with members outside of the 20-34 age range.

This suggest that policy-makers should pay particular attention to targeting their programs carefully. Building bureaucratic-based supports, for example, may provide support for single mother households and the elderly, but not many others of the groups identified. In addition, except for employment, there seems to be little evidence of substitutions being made in one type of support for a shortage of support in another.

We should also note that the needs of particular groups were not highly visible until we separated our analysis into the four types of support. The special needs of young and old adults and those involved in home care, for example, are glossed over by aggregated data on social support. This becomes even more apparent when we examine the evaluations provided by the various types of households.

### 5.5. Examining contextual effects

Finally, we turned to examine the role of the local context on the use and evaluation of social supports. This was conducted using the extensive site-level information collected as part of the NRE sample selection process and subsequent profile series. It allows us to explore whether the economic and institutional context of the location is likely to affect the types of supports used and the extent to which they are useful for dealing with the changes that people faced.

Variations in the local context are first of all represented in the sample frame structure of the 32 field sites chosen as part of the NRE Project. These sites were selected to permit comparisons on five key dimensions that had been shown to have important implications for the conditions and options of rural places:

- whether they were strongly integrated into the global economy or were relatively isolated from it;
- whether the local economy was relatively stable or whether it fluctuated in an unpredictable fashion;
- whether the site was located close to or far away from major urban centres;
- whether the site had considerable institutional capacity (e.g. schools, hospitals) or whether these institutions were lacking; and
- whether the site was leading or lagging on a number of socio-economic indicators (incomes, employment, family structure) (Reimer 2002).

We expect to find that the types of support used and the outcomes of that use will vary with respect to these dimensions, since they are likely to be related to the nature and levels of available social capital in the sites (Reimer in review).

Our data also allows us to examine the extent to which this available social capital is related to the use of social supports. Using information regarding the enterprises, social services (formal and informal), voluntary groups, and community events, we have constructed indexes regarding the social capital available in 20 of the field sites (Reimer in review). As with the measurement of social support, we have divided the available social capital into the four types of relational systems used when analyzing social support. Thus, we are able to consider market-based social capital (reflected in enterprises and business groups), from bureaucratic-based social capital (reflected in government agencies and legal services). We were also able to distinguish these from associative-based social capital (voluntary groups and common-interest clubs) from communal-based social capital (family structure and neighbourhood events). We expect that extent to which these various types of social capital are available nearby will condition the types of support sought by individuals and households.

We included a regional variable in our analysis since there is previous evidence that provincial jurisdictions and regional histories play important roles in the opportunities and inclinations of people to seek various types of social support. Table 3 parallels the logistic regression analysis in Table 1, with the addition of the context variables. This

will provide a means to identify those context variables that are likely to condition the relationships previously examined.

**Table 3**: Odds ratios and logistic regression coefficients for significant variables relating to types of social support - with context variables (NRE Household survey, N = 1135) (p<.05 in all cases)

| | **Type of Support Used** | | | |
|---|---|---|---|---|
| | **Market** odds ratio (B) | **Bureau.** odds ratio (B) | **Assoc.** odds ratio (B) | **Commun.** odds ratio (B) |
| Nagelkerke $R^2$ | .12 | .09 | .09 | .12 |
| Constant | .21 (-1.57) | .56 (-.58) | .09 (-2.44) | 1.51 (.41) |
| HH includes 18-24 yr old | .60 (-.51) | | | |
| HH includes 35-49 yr old | | | | .74 (-.28) |
| HH includes 50-64 yr old | | | | .74 (-.30) |
| HH includes 65+ yr old | .45 (-.80) | 2.06 (.72) | 1.46 (.38) | |
| Female single parent | | | | 4.62 (1.53) |
| <High School (reference category) | | | | |
| High school completion | 1.18 (.16)ns | | 1.33 (.28)ns | |
| Post-secondary (non-univ.) | 1.97 (.68) | | 2.05 (.72) | |
| University | 1.59 (.46)ns | | 1.65 (.50)ns | |
| Female only household | | 1.00 (.00)ns | | |
| Male only household | | .57 (-.57) | | |
| At least one person in past primary employment | 3.08 (1.13) | | 3.49 (1.25) | |
| At least 1 HH member employed FT or PT | 2.12 (.75) | | | |
| Median HH income <$20K | | 2.00 (.69) | 3.00 (1.10) | |
| Median income $20-29K | | 1.50 (.41)ns | 1.53 (.42)ns | |
| Median income $30-39K | | 2.28 (.82) | 1.83 (.60)ns | |

| | Type of Support Used | | | |
|---|---|---|---|---|
| | **Market** odds ratio (B) | **Bureau.** odds ratio (B) | **Assoc.** odds ratio (B) | **Commun.** odds ratio (B) |
| Median income $40-59K | | 1.61 (.48) | 1.42 (.35)ns | |
| Median income $60-79K | | 1.64 (.50) | 1.86 (.62)ns | |
| Median income $80K+ (reference) | | | | |
| Home care needed in HH | | | 1.96 (.67) | |
| Newcomer (reference category) | | | | |
| Lived all life in site | | | | |
| Returnee to site | | | | |
| Globally Exposed | | | .50 (-.70) | |
| Fluctuating Economy | .71 (-.34) | 1.28 (.25)ns | .50 (-.77) | |
| Adjacent to Metro | | | 1.49 (.40)ns | 2.09 (.74) |
| High Institutional Capacity | .68 (-.38) | | .37 (-.98) | |
| Atlantic (reference category) | | | | |
| Québec | .58 (-.54) | .62 (-.47) | .90 (-.11)ns | .73 (-.32)ns |
| Ontario | 1.68 (.52) | 1.00(-.00)ns | 2.48 (.91) | 1.13 (.13)ns |
| West | .68 (-.38)ns | .61 (-.50) | 1.07 (.06)ns | .59 (-.53) |
| High Market Social Capital | | | | 1.42 (.35)ns |
| High Bureaucratic Social Capital | | | | 2.45 (.90) |
| High Associative Social Capital | | | | .36 (-1.02) |
| High Communal Social Capital | | | 1.64 (.49)ns | |

ns = not significant
Shaded cells indicate important change from the values in Table 1.

Most of the results remain from the previous analysis in spite of the addition of the contextual variables. The importance of age, gender, education, employment, income, and home care needs remain for the level of social support used. At the same time, the

context variables suggest important impacts on the use of social supports independent from the household characteristics. The four sample frame variables, regional location, and local social capital all appear to relate to the use of social supports. Market-based social supports are used more in stable economies, those with low institutional capacity, and those in Ontario as compared to the Atlantic region. Bureaucratic-based supports are used more in fluctuating economies and in Ontario. Associative-based ones are used more in sites that are isolated from the global economy, stable, adjacent to metropolitan areas, those with low institutional capacity, and those with relatively high levels of communal-based social capial. They are also more likely used in Ontario and the West. Communal-based social supports are more likely used in those sites that are adjacent to metropolitan centres, in Ontario, and where there are relatively high levels of market or bureaucratic-based social capital or low levels of associative-based social capital.

The introduction of the regional variable appears to have its greatest impact on the market, bureaucratic, and associative-based social supports. If we examine the shaded cells within the table, we can identify the places where contextual variables may have an impact on the use of social support with respect to types of households. In the case of market-based social support there appears to be little impact on the previous relationships. For bureaucratic-based supports, however, we find that the age category of 50-64 year olds, single mother status, and employment all disappear as significant factors. For associative-based supports, 65+ age status and previous employment in primary industries emerge as important considerations and for communal-based supports we see that the importance of previous employment in primary industries and time spent

in the site disappear as important. These results point us to potential interactions between the household characteristics and the contextual conditions that should be investigated.

This analysis is complicated by the fact that several of these variables are measured at the level of the site whereas others are measured at the level of the household. This creates challenges for the analysis since the variances within each site on the context variables will be zero. In order to deal with this, we conducted logistic regression analysis using some of the key variables above, introducing interaction coefficients where conditional effects seem likely. Examples of the more significant ones from this analysis are provided in the tables and graphs below.

**Table 4**: % HHs using communal-based supports by communal-based social capital and employment

| | Communal-Based Social Capital | |
|---|---|---|
| | Low | High |
| Unemployed | 56.5% (161) | 70.7% (181) |
| At least 1 employed | 56.5% (481) | 59.3% (474) |

**Figure 4**: Interaction effect of social capital and employment status on use of communal-based supports

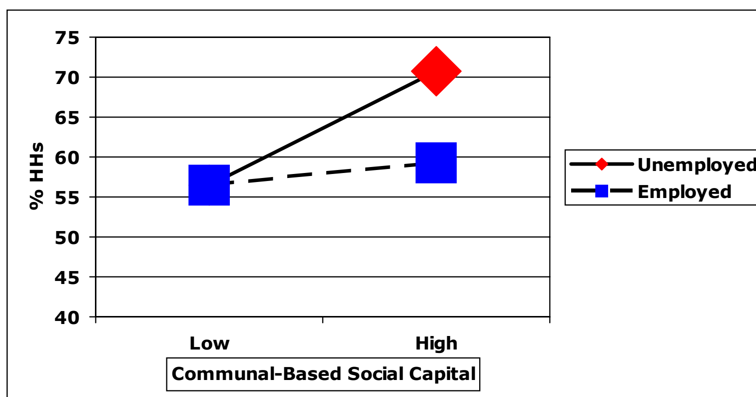


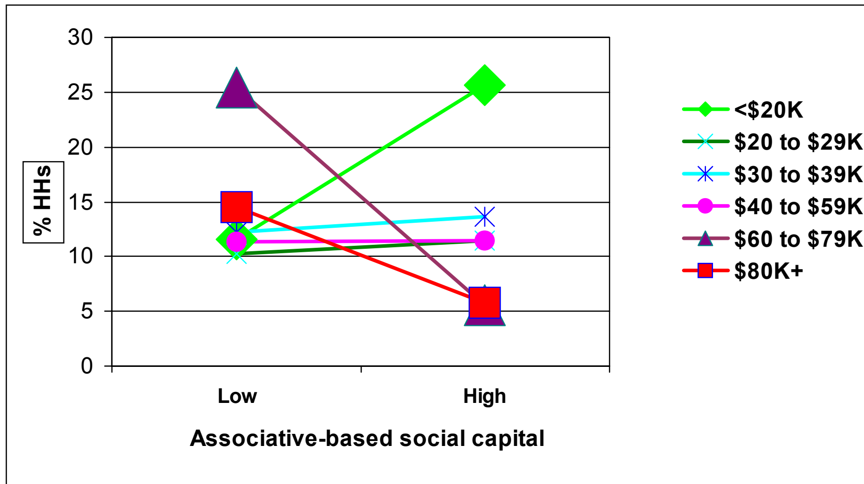
Table 4 and its associated Figure 4 represent the way in which the level of communal-based social capital in the site will affect the extent to which employment status is related to the use of communal-based supports. Where the site-level social capital is high, unemployed people are more likely to use communal-based supports than where the social capital is low. These results suggest where intervention at the site level may create important opportunities for choices at the individual or household level.

Table 5 and Figure 5 provide an example relating to income levels. They demonstrate how the level of associative-based social capital in the sites differentially affects the use of associative-based social support according to the levels of incomes. In sites with a relatively high level of associative-based social capital (such as volunteer groups or religious institutions) low income households are more likely to use associative-based supports than in those with low levels of this social capital. To this point the results parallel the findings in Table 4. At the same time, however, we find that the availability of high levels of associative-based social capital decreases the chance that high income households will make use of this type of support. In fact, among the $60K to $79K income group, they are more likely to use associative-based supports in those sites with a relatively low level of associative-based social capital. From a simplistic point of view, building associative-based social capital is more likely to benefit low income households than high income ones, at least with respect to their use of associative-based social supports.

**Table 5**: % HHs using associative-based supports by associative-based social capital and employment

| | Associative-Based Social Capital | |
|---|---|---|
| | Low | High |
| < $20K | 11.6% (95) | 25.6% (78) |
| $20K to 29K | 10.3% (97) | 11.5% (87) |
| $30K to $39K | 12.2% (74) | 13.6% (66) |
| $40K to $59K | 11.3% (115) | 11.5% (122) |
| $60K to $79K | 25.4% (67) | 5.6% (107) |
| $80K+ | 14.5% (76) | 5.8% (156) |

**Figure 5**: Interaction effect of associative-based social capital and income on % use of associative-based social supports



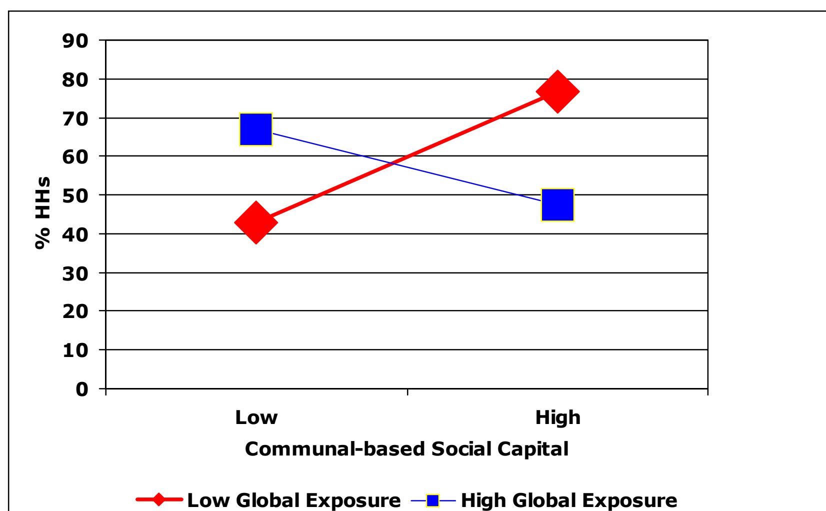

Our third example illustrates the importance of the sample frame variables on the support processes. We compare sites that have high levels of exposure to the global economy with those which are relatively isolated. This difference interacts with the level of communal social capital to affect the level of use in these types of supports. Table 6 and

Figure 6 illustrate these relationships. We see that the relative use of communal-based social supports reverses according to the exposure to the global economy and communal-based social support. In those sites that are well connected to the global economy, we find that increasing the level of communal social capital will mean a decrease in the use of communal-based social supports. On the other hand, for those that are relatively isolated from the global economy, the reverse is true.

**Table 6**: % HHs using communal-based supports by global exposure levels and communal-based social capital

| | Exposure to the Global Economy | |
|---|---|---|
| Communal-based Social Capital | Low | High |
| Low | 42.8% (278) | 67.0% (364) |
| High | 76.6% (338) | 47.3% (317) |

**Figure 6**: Interaction of global exposure and communal-based social capital on use of communal-based social supports



Similar types of conditional effects occur with respect to most of the other household characteristics we have examined above and with all of the sample frame variables. Single parent status, for example, interacts with associative-based social capital to produce the highest level of use of associative-based supports within sites were the associative-based social capital is highest. This is not a simple additive effect since associative-based social capital is negatively related to the use of associative-based social support once the interaction effect is controlled. Other conditional effects occur with the sample frame variables as well, including global exposure and bureaucratic-based social capital; economic stability with market and bureaucratic-based social capital; metropolitan adjacency with market and communal-based social capital; and institutional capacity with communal-based social capital. The leading or lagging status of the site interacts with both market and communal-based social capital as well.

These results provide an important caution to policy-makers when considering the extent and nature of social support. They highlight the way in which local conditions can significantly condition the availability and use made of various types of support and their relationship to the outcomes considered. They should also encourage researchers to design their case studies within systematic frameworks in order to include contextual comparisons at all points. Without such comparisons we are unable to see how the context may produce quite different results even as we focus on similar household or individual conditions.

## 6. Conclusions

Both general and specific conclusions can be drawn from this research. Not only does the evidence supported the important distinctions in types of social support as they have been outlined in our framework, but it has provided details about the particular dynamics of inclusion and exclusion for the different types of persons and conditions.

At a theoretical level, the results confirm the utility of focusing on the four systems of social relations. The results support our assumption that each system operates with considerable internal consistency – most likely a reflection of institutional arrangements on one hand and individual preference and skill on the other. If we were to gloss over these differences, we would lose valuable insights into the operation of each type of process and miss the important consequences for specific types of people.

The elaboration of these processes has just begun, however. The data we have collected so far provides confirmation of the perspective, but it is inadequate to the task of detailing how they work. We learn, for example, that single mothers use bureaucratic and communal supports, but we are unable to see how they combine them in particular circumstances without more detailed study of several cases. This is even more important when we discover that associative social support is more likely to be used by single mothers in those sites which have high levels of associative-based social capital. Such results beg for research which is both intensive and comparative.

Our research also confirms the operational feasability of the theoretical framework. We have been able to construct indexes for the various types of social support that appear valid and reliable – even across many different rural contexts. By focusing on responses to major changes in the household, we have been able to construct measures that are reasonably comparable across households and sites. This has involved the development of a grid for moving from relatively open-ended queries to a standardized form – eventually allowing comparisons among equivalent conditions.

Our work also identifies some specific types of people and supports that require policy attention. It provides some suggestions regarding the directions that particular policies and actions might take. It confirms, for example, the special attention required of single mothers, the poor, the uneducated, and those in need of health care. It also suggests that their needs may be different in different locations. Single mothers make use of bureaucratic, associative, and communal sources of support. This suggests that it is in these areas that supports must be strengthened and access ensured so that their needs may be appropriately met. Even if one were to encourage more use of market-based relations in this situation (e.g. private day care) the results suggest that it must be done in concert with the other three types of relations in order to ensure access and satisfaction.

For the poor, the data suggest a different approach. They are unlikely to have access to market-based relations and even communal ones do not provide a dependable basis of support. In this case, our evidence suggests that it is the bureaucratic and associative-based relations that are most likely to serve their needs, at least in the first instance.

Welfare programs and voluntary groups are likely the key representatives of these relations, so this is a reasonable place to start. Using such programs as a base, it may then be possible to expand the availability of market and communal-based supports as well as the ability of excluded people to access them. Although our work has not yet provided the details of how this might take place, it provides a focus and direction that holds considerable promise over undifferentiated approaches.

Program delivery strategies must also take the location into account. Building bureaucratic infrastructure in metro-adjacent areas is likely to have very different outcomes that in more remote locations. Once again, we find that single mothers make more use of the various forms of social support in those places where they are not adjacent to urban areas. In metro-adjacent areas, they show few differences from others in the population. On the other hand, those in need of support for home care are more likely to use associative-based help if they live near urban areas. We need to understand why this is so in order to more effectively target programs of support.

Finally, this research emphasizes the importance of both intensive analysis regarding the processes of social exclusion and the framing of this research within a broader context. Without the broader context, case study conclusions are likely to be limited and potentially distorting. This becomes even more important for the initiation of policy based on the research. We have seen how the same individual or household characteristics can produce very different reactions according to the economic and social

context of the local conditions. Policies that ignore these results or remain blind to them because of limited research are liable to be ineffective at best and damaging at worst.

As is so often the case, this research opens up new questions even as it provides answers to others. At a theoretical level, we need to explore the relationship between social support and social exclusion, for example. Using or not using various types of relations for social support bears an equivocal relationship to social exclusion in general. Does not using a particular type of support mean one is excluded? Does using it, mean one is included? At what points does the use of a support become dependency, for example, thereby increasing the vulnerability of the user?

We also need to elaborate and explore the ways in which people use supports from the various types of relations in concert. It is clear from both our own and others research that access to resources in one sphere requires skills and resources in another, but the details regarding how this is done remain unclear. Our data also suggest that the approaches taken will vary not only by the type of person involved, but by the characteristics of their location as well. This type of research requires the depth of information provided by interviews and observation, but only if it is done in a systematic way – allowing comparisons to be made across venues and conditions.

This research calls for a level of research intensity and comparison that requires a considerable investment of resources and a substantial increase in our collaboration. Intensive case study research requires time and attention that leaves little room or energy

for multiple site comparisons. Comparative site-based research requires a level of standardization that is challenging to the idiosyncracies of each case and to the multiple traditions of social science researchers. However, the need is sufficiently great that these challenges should be faced and solutions developed that will be adequate to the complexity and importance of the issues.

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