




NRE<sup>2</sup> BUILDING RURAL CAPACITY IN THE NEW ECONOMY

# Social Exclusion and Social Support in Rural Canada

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- Acknowledgements:
- Social Sciences and Humanities Research Council of Canada
- The Rural Secretariat of Agriculture and Agri-food Canada
- Rural Citizens in our field sites
- Becky Lipton helped with the document
- My objective is
  - Provide a framework for investigating social inclusion and inclusion
  - Use it to examine how people use various sources of social support in rural Canada
    - Test the model/framework
    - Learn something about social inclusion and exclusion in rural Canada
  - Provide some of the key findings
  - What are some of the policy and research implications?

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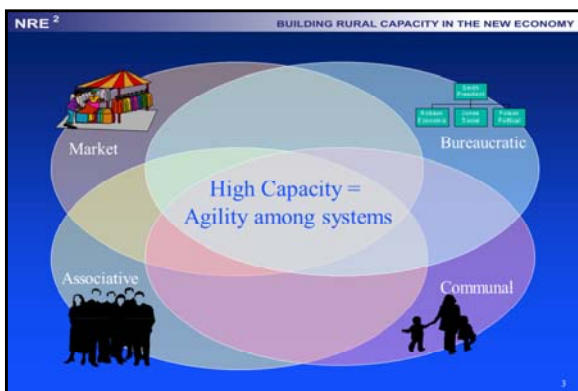
## Social Exclusion and Inclusion

- About access to resources and services
- Focus on processes by which it occurs
- Mediated by social relations
- Conditioned by context

2

### Social Exclusion and Inclusion - Approach

- (S) Social exclusion and inclusion is about access to resources and services
  - Those who are unable to access basic resources and services are more excluded than others
- (S) Focus on the process by which it occurs rather than outcomes
- (S) This occurs through social relations
- Therefore key questions:
  - In what ways is the access to resources and services conditioned by the norms, values, and organization of social relations?
- (S) Recognize the important role of contextual conditions that enhance, constrain, structure the processes by which people, groups, or institutions access resources and services
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- This paper:*
  - Propose a taxonomy of basic systems of social relations*
  - Examine how they condition access to resources and services*
  - Do this in the context of social change*
  - Focus on social support*
  - Examine the Canadian rural situation*
  - Lay the basis for more systematic case study analysis of the processes of social exclusion and inclusion*



- Access to resources and services is mediated through four basic types of social relations
  - These are ways in which people co-ordinate their action to produce outcomes
    - Include norms for behaviour, assumptions regarding membership, principles **by which resources and services are distributed**
    - Conceived of as systems of legitimation for those actions and distribution
  - (S) Market
    - Based on contractual relations – usually short term, exchange oriented, guided by supply and demand
      - Predominate in commercial interactions, housing markets, job markets, and all levels of trade relations
      - Distribution of resources and services on the basis of ones ability to trade and exchange
  - (S) Bureaucratic
    - Classic rational-legal relations as articulated by Weber
    - Guided by general principles and interlocking roles as reflected in by-laws and organigrams.
      - Predominate in corporations, public institutions, many NGOs
    - Distribution of resources and services according to one's assigned role and status (within and external to the organization)
      - If you meet the criteria (e.g. age class), you gain access to the resources – so long as you know the criteria and how to use them
  - (S) Associative
    - People come together and organize their activities around a common interest
    - Participate so long as this interest is being served – or is likely to be achieved
      - Predominate in voluntary organizations, social action groups, emergency responses
    - Distribution of resources and services according to one's commitment to and support for the common interest
  - (S) Communal
    - People organize their behaviour with respect to family, ethnic, or other complex loyalties
    - Inclusion and exclusion usually guided by ascribed characteristics or strong identities
    - Don't have the single-focus outcomes as found in Associative relations
      - Predominate in families, gangs, cults, etc.
    - Distribution of resources and services according to identity (often ascribed) and loyalty
  - These four systems are interrelated – most often within the same organization, group, or locale
  - They operate at multiple levels (households, communities, regions, nations)
  - (S) All forms are necessary in a complex, changing environment - The more agile a person or group is in being able to use all systems, the greater will be their capacity to access resources and services - especially under conditions of change
  - These 4 types of relations lie at the basis of social exclusion and inclusion
- 
- *Eg. Hutterite community: inclusion/exclusion according to status, identity, and profession of faith*
  - *Eg. Farmers: traditionally inclusion/exclusion according to competitive advantage in local markets; now according to global markets*
  - *Eg. Elderly: inclusion/exclusion according to relationship to universally applied criteria of age, previous employment status, and marital status*

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## Social Relations in the NRE

- Market and Bureaucratic more important
  - Individual: bank machines, medical services, jobs
  - Community: municipal services, economic development
- Associative and communal stressed
  - Smaller pool
  - Mobility undermines trust
  - Centralization increases demands
  - Specialization disadvantages smaller places

How do these affect access to social supports?

4

Changing Social Relations: How do the changes in the new rural economy affect the four types of social relations?

•(S) **Market and Bureaucratic more important now than before**

- Market and bureaucratic skills become essential for access to income and finances, employment, housing, social services, consumer goods)
- Individual level
  - How to work a bank machine, how to access medical services, how to appeal to employers
- Community level
  - Providing municipal services, financing economic development, relating to other state and non-state actors requires skills in management, finance, and regulations
  - Emergence of class of brokers: Community Development Officers, Business development plans, Grant writers

•(S) **Associative and communal stressed**

- Population decline reduces pool of potential participants
  - Stresses those who are left
- Increased mobility undermines traditional relations
  - Challenges trust and information flow
- Centralization of services places more demands on Associative and Communal supports
  - e.g. more travel time
- Specialization tendencies disadvantage smaller places
  - Insufficient demand for specialization advantages to be felt
    - Doctors
    - Commercial ventures (Big Box stores)
    - Education
- (S) The question driving our research at this point:
  - How do these changes affect the access to social supports?
  - Who wins and who loses under these circumstances?

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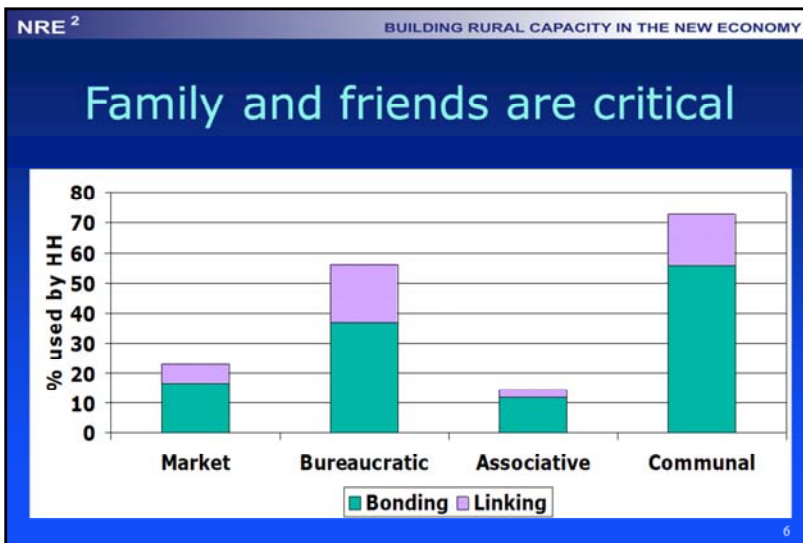
## Research Approach

- Household survey (1995 interviews)
- 22 of the 32 sites in the NRE Rural Observatory
- Provides:
  - Social Support information
  - Contextual information
    - Field site level
    - Relationship to the regional and global economy

5

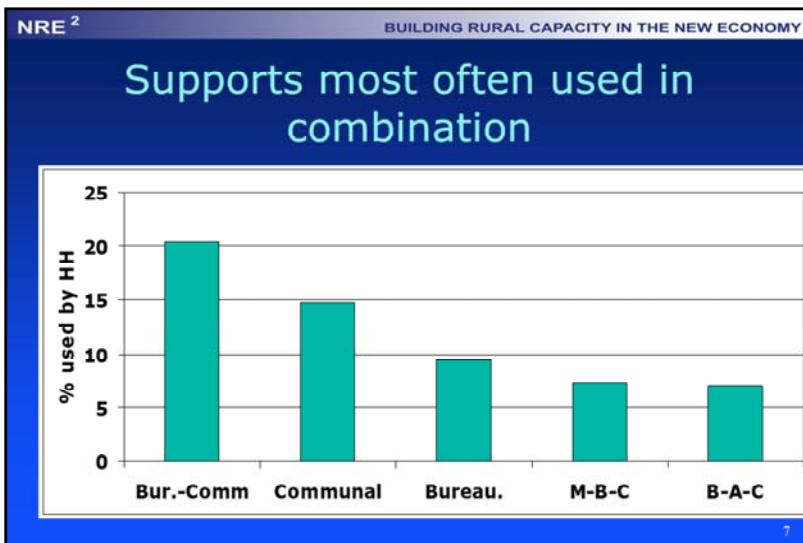
### Research Approach

- (S) Household survey (1995 interviews)
- (S) 22 of the 32 sites in the NRE Rural Observatory
- Extensive information on demographics, labour force participation, use of services, social support, use of new technologies, informal economy activities, social cohesion
- Focus here on social support
  - What were the major changes in the HH over the last year
  - For the one with the greatest impact:
    - How did you deal with it?
    - To whom/what did you turn?
    - What were the outcomes?
    - What tradeoffs did you have to make?
- (S) Provides:
  - Extensive information on social support
    - Moves beyond anecdotal, single case study information
    - Moves beyond examination of key groups in isolation (i.e. controls introduced)
  - Extensive information on context:
    - Field site profiles: enterprises, organizations, services within region
    - Sample frame construction: relationship to the global economy
- NEXT: What have we learned?



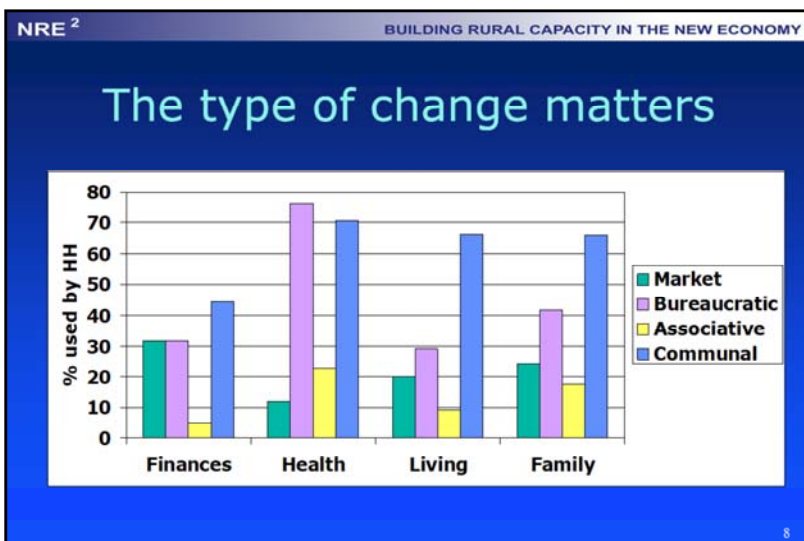
Levels of social support by 4 types and Origin

- Social support is only one component of social inclusion and exclusion
- Use of social support reflects:
  - Personal preferences and abilities
  - Relative levels of access to supports
  - Constraints imposed by:
    - Structures
    - Prejudice
    - Norms and entitlements
- (S) Bonding = within 30 minutes of site
- (S) Linking = beyond 30 minutes of site
- Actual frequencies of use
  - Communal the most often used
  - Bureaucratic next
  - Communal and Bureaucratic also the most linking (note importance of weak ties)



We argue that some of the variation in use is due to the compatibilities and inconsistencies between the various types of social relations.

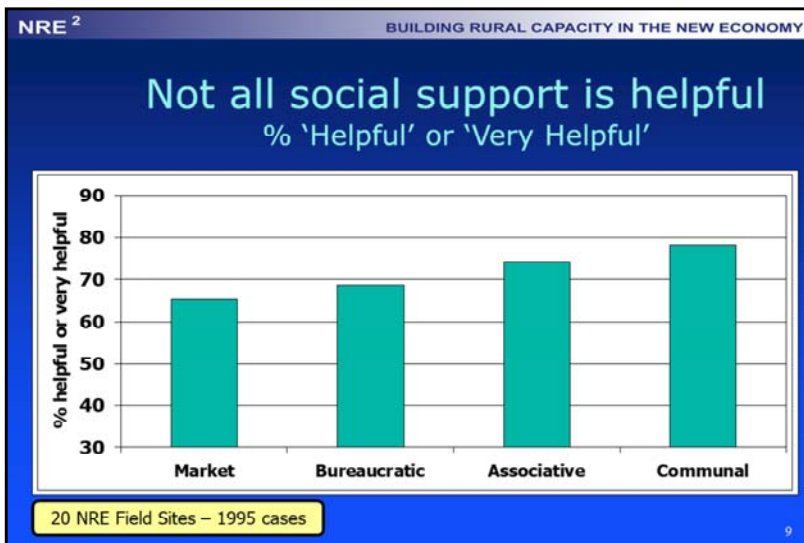
- (S4) See this in the combinations of use
  - Bureaucratic (State) mandate to provide social support for those who are challenged by age, health, education, welfare, etc.
- Basic mistrust between market and associative
  - Associative requires shared interest
  - Market requires personal focus and gain
  - Unstable alignment (cf. business club rules re. discussing specific business decisions and strategies)



The nature of the change also matters

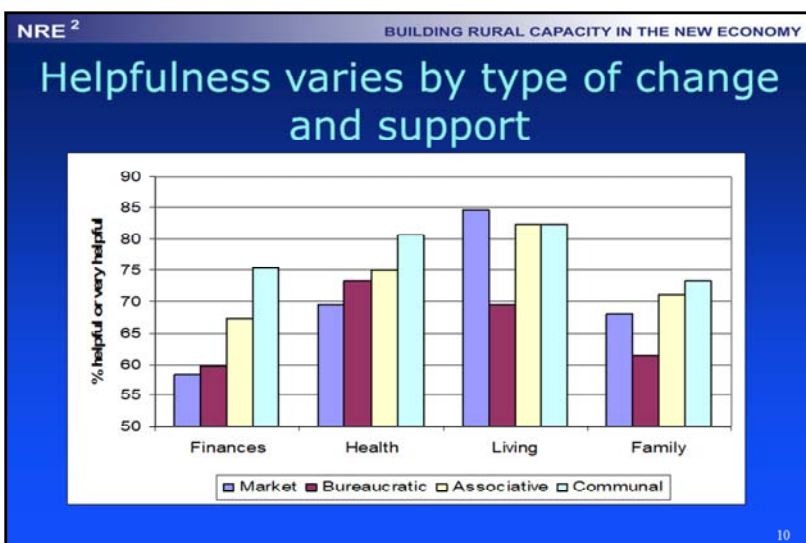
- Social Support by the 4 types and the nature of the change in the household.
  - Organization of institutions of social support condition the types of social support used
  - E.g. medicare in Canada – high levels of bureaucratic relations for health
- (S4) Financial changes:
  - Communal most often used, then bureaucratic, then market
  - Communal most often remains a theme
- (S4) Health:
  - Bureaucratic gains in relative importance (note Canadian medicare system)
  - Market least important
- (S4) Living Arrangements (moving home, relatives moved in or out, renovations)
  - Associative relations become least important
  - Market increases (legal involvement?)
- (S4) Family arrangements (marriage, divorce, separation, death, birth, etc.)
  - Similar to 'Living Arrangements'
- General:
  - Key role of communal remains overall
  - Bureaucratic second
  - Associative and Market vary with the nature of the change
- Lessons for access
  - Informal (communal) must be considered in combination with others
    - Eg. access to medical services, banking services, etc. rely on communal brokers





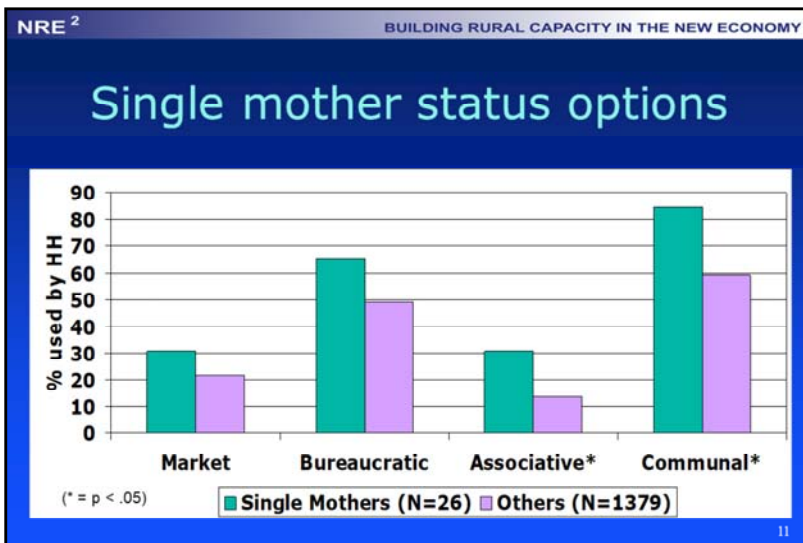
How do people evaluate the different types of social supports?

- Assume: less helpful reflects exclusion processes – through:
  - lack of access to better alternatives
  - exclusion from entitlements
  - prejudice
- Asked them what were the major changes that had occurred in their households over the last year
  - How did they deal with/respond to these changes?
  - To who did they turn?
- Were the supports helpful or very helpful?
- (S4) Communal, associative, bureaucratic, market helpful in that order.

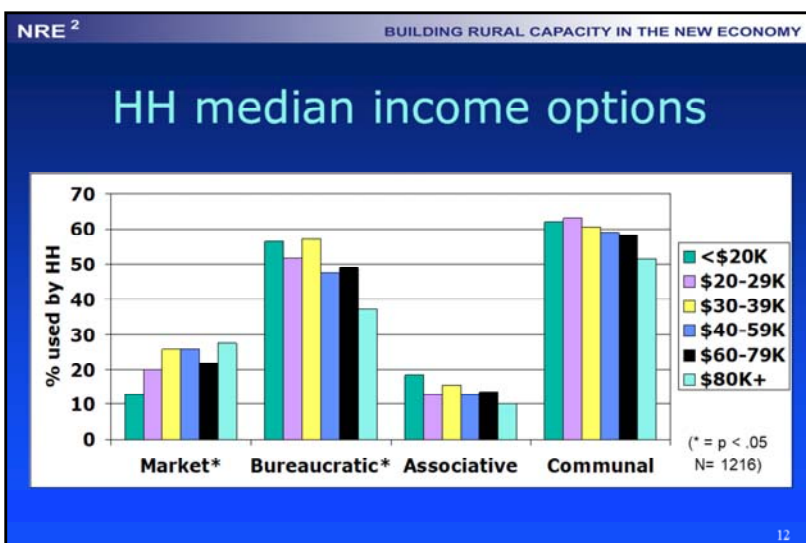


Helpfulness also varies by the type of change and support

- Evaluation of the type of supports used.
- % who said that the support strategy was Helpful or Very Helpful
- (S) Finances:
  - Communal was most helpful – consistent with it being used the most
  - Associative was also very helpful – but note it was not often used
    - Is this a reflection of the availability of associative-based financial supports?
  - Market-based were the least helpful
- (S) Health:
  - Similar pattern as for finances – although remember that bureaucratic was extensively used
- (S) Living Arrangements:
  - Market-based extremely successful, yet not often used
    - What types of market-based supports are used? (legal, moving companies, construction?)
  - Only bureaucratic-based seem particularly problematic
- (S) Family Relations:
  - Similar pattern as for Relations – although market used less
- Implications:
  - Use and helpfulness not always correlated
  - A reflection of availability of the services? (not an open market – not easy or free choice of social supports?)
  - Research questions:
    - Who are the people who are using sources of support that they don't find useful? Why?
    - Why are these sources not helpful?
  - Conceptual questions:
    - If they are not helpful – does this mean they are exclusionary?
- NEXT: consider the implications for some of the types of people and groups who have traditionally faced exclusion processes

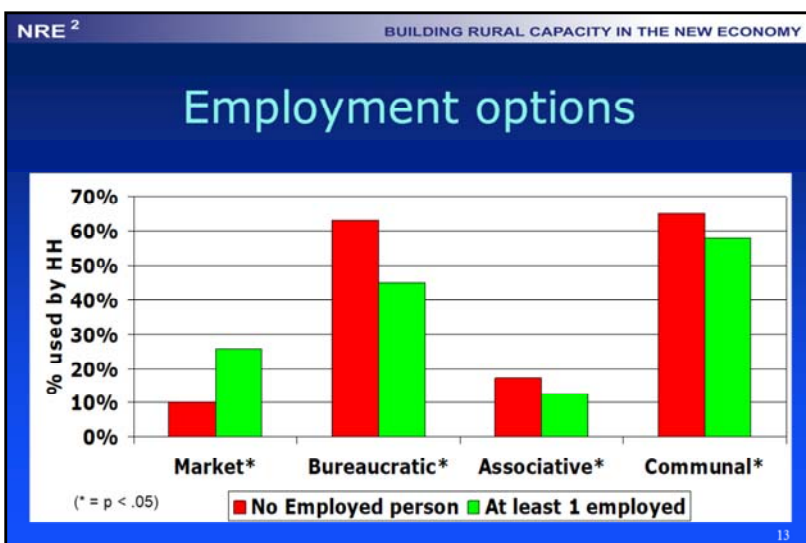


- Consider the use of social support for types of individuals and groups that have been most often identified as subject to exclusion processes
- Eg. Single mothers
- (S4) Only Associative and Communal differences are statistically significant
- Greater use of all types of supports than other types of households
- Reflects vulnerability – but also integration

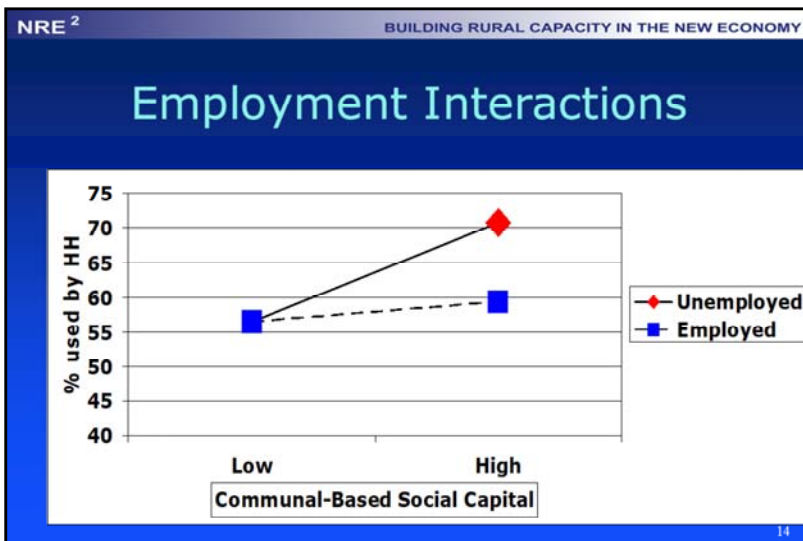


What about differences among income groups? (another focus of social inclusion/exclusion)

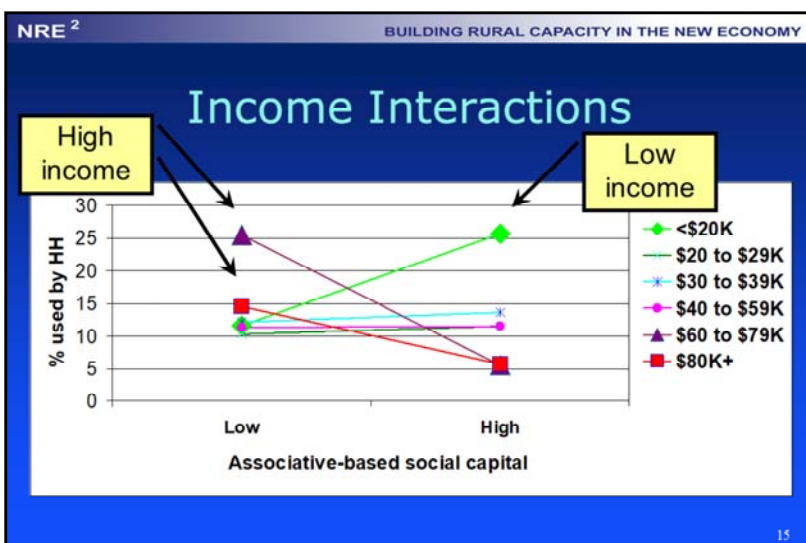
- (S) Among market relations – low income households show lowest use
  - In this case, low use means social exclusion processes at work?
  - Requires more detailed data collection that we have available at this time
    - e.g case studies
- (S) Bureaucratic: high levels of use among low income households
  - Reflect the social safety net – government supports?
  - Again – more details required
- (S) Associative – no significant differences
- (S) Communal – no significant differences
- Clearest illustration of the difference between market and bureaucratic sources of support
- Some indication of associative contribution at the lowest levels
- Requires more detailed analysis



- Employment in HHs
  - Is there at least 1 person employed in the HH?
- Unemployed
  - (S) Less use of Market
  - (S) More use of Bureaucratic
  - (S) More use of Associative
  - (S) More use of Communal
- All statistically significant
- Similar questions emerge regarding the processes as were raised by the results from income levels
  - In what ways are processes of access to each type different?
  - What types of households are represented among the employed and unemployed?
  - What does this imply about policies of support?
    - Both employed and non-employed rely on Communal and Bureaucratic supports over Associative and Market?
- NEXT: How are these relations affected by the context in which people live?

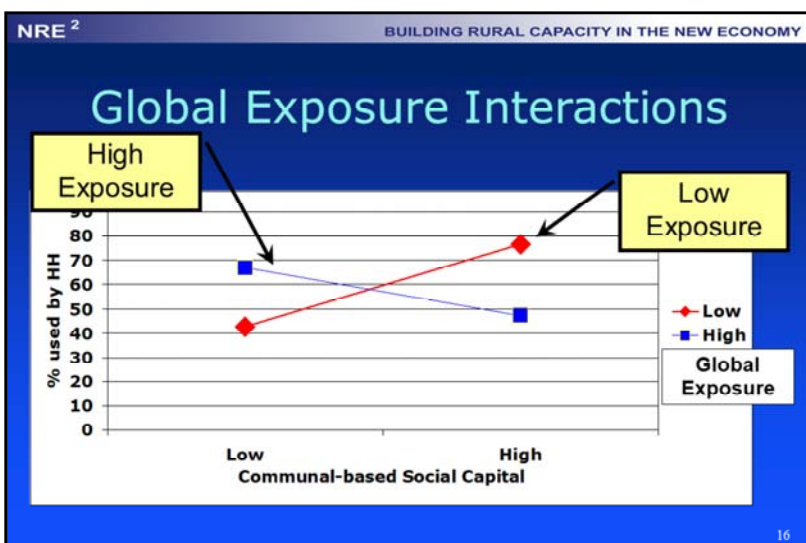


- Examining the role of the social context
  - Does it matter where you live?
- Look at:
  - Availability of social capital in various forms
  - Sample frame variables
  - Regional variables
- Interaction effect between employment and availability of communal social capital for the use of communal supports
- (S) Among unemployed:
  - Availability of communal-based social capital increases the use of communal-based supports
- (S) Among employed:
  - Only a minor impact
- Where communal-based social capital is high, unemployed households are more likely to use it than employed
- Implications
  - Building site-level social capital has a sort of accelerator/amplification effect on the use of communal-based social support
    - May be used as a strategy for improving support of unemployed – focus on the location/region as well as the individual
  - For research: May be invisible in simple analyses – where independent effects only will wash out the special advantages of context
- NEXT: What about incomes?



### Income Interactions

- What differences do site characteristics make on social support use by various income groups?
- Use of associative-based supports by income and level of associative-based social capital in the site.
  - Question: if we build associative-based social capital (or if it becomes more important), who is likely to make most use of it?
- (S2) Low income groups (< \$20K)
  - More use of associative-based social support where associative-based social capital is high
  - Suggests more availability → greater use
- (S3) Medium income groups (\$20K-\$59K)
  - Little difference depending on level of social capital in site
- (S2) High income groups (\$60K+)
  - More associative-based social capital → less use
  - Counter-intuitive from the availability hypothesis
- Implications
  - High levels of Associative-based social capital (volunteer groups, clubs, religious institutions)
    - Biggest positive impact on low income HHs
  - Is building associative-based social capital an important focus for integration and support of the poor?
- NEXT: what about the sampling frame variables?
- 
- Other HH characteristics examined:
  - Single mothers: highest level of use of A-based SS in sites where A-SoKp is high.
  - Not simple additive effect since A-SoKp alone is negatively related to use of A-SoKp once interaction is controlled.



Five dimensions on which we chose the field sites – systematic comparative approach

- (S2) In sites with low global exposure:
  - Increasing communal-based social capital means increasing the use of communal social supports
- (S2) In sites with high global exposure:
  - Increasing communal-based social capital means lowering the use of communal social supports
- Implications?
  - Does this mean that family and neighbourhood support policies will have opposite effects in communities which are well connected to the global economy from those that are relatively isolated from this economy?
  - Why does this occur?
  - What are the processes by which it occurs?
  - Needs more detailed study of these processes.
- Similar conditional effects occur with respect to all 5 of the sample frame variables:
  - Global exposure and B, A social capital and support: High glob, Low BSK → Low use of BSS; Low glob, Low ASK → High ASS use*
  - Stability of the economy and M, B social capital and support: Stab, High MSK → High MSS use; Stab, Low BSK → Low BSS use*
  - Metro adjacency and M, C social capital and support: Adj, High MSK → Low MSS use; Adj, High CSK → High CSS use*
  - Institutional capacity and C social capital and support: Low Cap, Low CSK or High Cap, High CSK → High CSS use*
  - Leading/Lagging status and M, C social capital and support: Lag, Low MSK → High MSS use; Lead, Low CSK → Low CSS use*



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## Key Points and Implications

- The processes are complex
- Case studies in systematic, comparative context
- Policies must be flexible
- Coordinate strategies and approaches

17

### Key Points and Implications

- (S) Processes of social exclusion are complex
  - Even looking at one aspect (use of social supports), we see that the type of changes people face, the type of support they turn to, the availability of various types of support, and the overall context of the community in which they live all play a part in these dynamics
    - Exploring them in more detail and separating out the various effects is a major challenge
    - This work is just a start
- (S) The techniques of analysis need to be developed
  - Individual case studies make an important contribution to the richness of the information regarding the social skills, entitlements, and strategies adopted by individuals and households (i.e. the processes)
  - But they are inadequate for identifying contextual effects and conditions
  - For this we need comparison, and comparison means some levels of standardization, larger samples, and techniques allowing us to separate contributions
  - All the time remembering that if we don't do this carefully, important aspects will be glossed over
- (S) Policies must be flexible
  - As we learn more about the importance of contexts, we see that:
    - Issues of exclusion cannot be solely the responsibility of individuals – especially those who are excluded
    - Addressing them requires us to address the contextual constraints
    - But the research also shows
      - How strategic contextual change may greatly enhance the individual abilities
      - Context sensitivity opens opportunities for greater inclusion
- (S) Highlights the importance of coordinated research and policies
  - Communal-based supports are key
    - Focusing on one type alone (usually bureaucratic) may not solve the problem since each may be more effective in combination (people use them this way)
  - Norms and entitlements within each type of support may conflict with others
    - The people who need the access to bureaucratic may be intimidated by it
    - The people who could benefit most from associative may be unable to contribute to the common interests or face stigmatization
  - Substitution and complementarity for types of support and inclusion should be developed and exploited
    - If people are excluded from associative-based supports, how about a backup through bureaucratic
    - But remember that bureaucratic norms act to exclude others – thus might consider ways in which partnerships might be developed to facilitate the ability of market, associative, or communal-based supports may occur.
    - Gives more detailed direction to the idea of a safety net
  - Coordination and collaboration also necessary among researchers
    - Depth of case studies time, energy, and resource – consuming
      - Doesn't leave much over for the comparison necessary
    - Comparison requires time, energy, and standardization of approach which is a major challenge to the uniqueness of each case
      - Also – career demands, professional pride, and institutional limitations get in the way
  - Must work around these in order to get the collaboration necessary to understand the details of the processes and the impacts of contextual effects.
  - We are working hard to do this
  - Welcome collaboration

# Social Exclusion and Social Support in Rural Canada

The Canadian Rural Revitalization Foundation


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