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Social Exclusion and Poverty in Rural Areas of Britain

Exclusion sociale et pauvreté dans les zones rurales de Grande-Bretagne

Mark Shucksmith

This paper draws on the following studies which were conducted as part of the JRF programme:

• Polly CHAPMAN, Euan PHIMISTER, Mark SHUCKSMITH, Richard UPWARD and Espe VERA-TOSCANO (1998), *Poverty and Exclusion in Rural Britain: The dynamics of low income and employment*. • Sarah MONK, Jessica DUNN, Maureen FITZGERALD and Ian HODGE (1999), *Labour Market Participation and Rural Disadvantage*. • Steve PAVIS, Steve PLATT and Gill HUBBARD (2000), *Social exclusion and insertion of young people in rural areas*. • Andy FURLONG and Fred CARTMEL (2000), *Youth unemployment in rural areas*. • Julie RUGG and Anwen JONES (2000), *Getting a JOB, Finding a Home: Capturing the Dynamic of Rural Youth Transitions*. • Katy BENNETT, Ray HUDSON and Huw BENYON (2000), *Rural Areas Learning from the Coalfields*. • Bill EDWARDS, Mark GOODWIN, Simon PEMBERTON & Michael WOODS (2000), *Community Action, Partnerships and Emergent Forms of Governance in Rural Wales*. • Pamela STOREY and Julia BRANNEN (2000), *Young people and transport in rural communities: access and opportunity*. • Natasha MAUTHNER, Lorna McKEE and Monika STRELL (2001), *Changing Work- Family Configurations in 3 rural communities*. • Mark BEVAN, Stuart CAMERON and Mike COOMBES (2001), *The Role of Social Housing in Rural Areas*.

Forces for change in rural areas of Europe

- 1 The economies and societies of rural areas of Europe are changing rapidly in the face of globalisation, economic restructuring, migration, and other social and policy changes. These forces have different implications for different areas and different social groups, in a wide diversity of rural contexts.

Market and economic forces

- 2 Many rural areas (for example, in Britain) are now growing faster in population than urban districts, while many others experience decline: the economic and social processes underlying these diverse trends are not always well understood. One key element is the increasingly global penetration of local markets. International capital may seek to exploit those rural areas characterised by low wages, a compliant, nonunionised workforce, and lower levels of regulation, leading to increased dependency and peripherality. On the other hand, many rural areas and firms seek to protect themselves from global competition by creating local products which depend upon a local identity for their market niche, so 'selling the local to the global'.
- 3 According to the European Commission (1997, p.15), agriculture and forestry no longer form the backbone of rural economies throughout the EU." Agriculture still employed 16 million people in Europe in 1993, but this constituted only 5.5% of total EU employment, and even in the most rural regions its share in 1990-91 was only 12%. Less than one quarter of these jobs were full-time, and an increasing proportion is part-time or casual. The Commission forecast a further fall of 15% in the number of farm holdings in Europe over the period 1993-2003, from 7.3m to 6.2m Employment has declined even more steeply in other primary sectors. In terms of output, agriculture contributes a declining share to GDP (eg. in UK this has fallen from 3% in 1973 to 1% in 1999), and this long-term decline is reflected in people leaving the industry and, during the late 1990s, in falling farm incomes. The structural force underlying this decline is continuing technological change which increases farmers' ability to supply while demand remains static. To some extent farmers have been protected from such global forces by subsidies, with EU expenditure on agricultural support currently amounting to some 41 billion euros per annum, and through trade protectionism.
- 4 The declining importance of agriculture and other primary activities has been more than offset in many rural areas by the growth of the service sector. The EC (1997, p.16) highlights some rural areas as the most dynamic in the EU, including Tyrol in Austria, East Bavaria, East-Central Ireland, the Alps and Atlantic-Arc départements in France, and several areas of Spain and Italy. Around 73% of jobs in rural Britain are now in services, compared to 60% in 1981, notably in public administration, education, health, distribution, tourism, and the financial services. In Sweden, every third job in the most rural areas is in public services. Rural areas have shared in a general shift to a service-based economy in which the information and knowledge-based industries play an increasing role, bringing both opportunities and threats.
- 5 The EC (1997, p.16) concludes that "rurality is not itself an obstacle to job creation which cannot be overcome: it is not synonymous with decline." Most rural areas in the UK, for example, have coped well with the need for structural economic change. "Employment in rural areas has increased more rapidly than in other areas,... [and] unemployment in rural areas is generally lower than in the rest of the country (4.2% for rural districts compared to 6.1% in England in 1998)" (Cabinet Office, 2000). This may be misleading, however, in so far as research by Beatty and Fothergill (1997) shows that unemployment is systematically under-reported in rural Britain, and this is likely to be the case throughout Europe. In addition, both part-time employment and self-employment are more common in rural areas. Moreover, some areas have found it harder to adjust to

rapid restructuring, notably those which are remote and have a high dependence on agriculture or other primary activity. Even where new jobs have appeared, some people have found it hard to adjust.

- 6 A particular feature of rural employment throughout Europe is the prevalence of small firms. Over 90% of all rural firms in Britain, for example, are micro-businesses, employing fewer than ten people, and 99% employ fewer than fifty. The rate of smallfirm formation in accessible rural areas of the UK is well above the national average, and most of these are set up by people who have earlier moved into these areas for a better quality of life, in contrast to urban start-ups (PIU, 1999). However, in the remoter rural areas the rate of small-firm formation is below the national average, partly because fewer people move there.
- 7 The European Commission (1997, p.14) notes that, “over the coming years, the capacity of rural areas to maintain or create jobs will have a major impact on the unemployment rate and/or migration flows.” Given that these are not likely to be in agriculture, that report goes on to suggest (p.16) that “the creation of rural employment results from a specifically territorial dynamic which may not yet have been systematically analysed at EU level, but which seems to include such features as:
 - A sense of regional identity and social cohesion;
 - An entrepreneurial climate, a capacity to link up with the economic mainstream, public and private networks;
 - A good educational level; and
 - An attractive cultural and natural environment.”
- 8 These may be summarised as cultural, social, human and natural capital. Their role in rural development is discussed further in Shucksmith (2000a).

Demographic and social changes

- 9 Fundamental demographic, social and cultural changes also characterise rural areas. Migration flows are critical in determining rural population levels and, while some rural areas in Europe continue to lose population, in many parts people are moving into rural areas because of the new values placed on rural space (e.g. clean environment, healthy lifestyles, community life). The consequences of the imposition of such values on rural societies may be far reaching. Between 1971-1996, for example, the population of rural England grew by 24%, compared to 6% nationally. Across the EU, 46% of predominantly rural regions (as defined by OECD, 1994) are growing, while 42% experience population decline; and of significantly rural regions 57% are growing, while only 34% decline (EC 1997, p.10).
- 10 This migration tends to be highly socially selective. Gentrification has been evident in many accessible or touristic areas of rural Europe, in so far as the affluent middle classes have migrated into the countryside, perhaps displacing less affluent groups (cf. Phillips, 1993 for evidence of this process in Britain) through competition for scarce housing. Much has been written about the rise of a rural professional and managerial ‘service class’ such that certain regions may be colonised by knowledge-workers at a distance from production activities. Even in some attractive remoter areas, retirement migration and distance-working may produce similar effects, though in less attractive (or ex-industrial) rural areas, with low wages and low rents, low-grade jobs may be all that 168

Social exclusion and poverty in rural areas of Britain can be attracted. The migration also tends to be age-specific, with young people often leaving rural areas, as discussed later in this chapter, and older families moving in.

- 11 Social relations are also changing in other ways with the rise of individualist values and the decline of established institutions, such as the churches, and the family. Higher divorce rates, delays in the age at which people get married and have children, and increasing life expectancies all tend to lead to a decline in the average size of households and to a greater demand for houses. Moreover, changes in the age structure of the rural population, together with the economic restructuring described above, are tending towards increased dependency ratios, casualisation, part-time working, and less job security. The interactions between these changes, in the family and in employment, are not well understood in rural contexts.
- 12 Housing markets are crucial in understanding the social changes taking place in rural Britain and in parts of Ireland, but their operation is less well researched in the rest of rural Europe. Social housing accounts for only 14% of the stock in rural areas of Britain, compared to 23% in urban areas. For most people, their housing opportunities depend upon being able to afford one of the owner-occupied houses which constitutes three-quarters of the stock. And yet there is often a strong demand for these houses from relatively affluent households who aspire to rural life while at the same time the supply of houses is tightly constrained by the planning process and the opposition of middle-class home owners to new building (Shucksmith, 1990a, 1990b). This tends to raise house prices and often restricts who can live in rural areas, as discussed further below.

Changing policy contexts

- 13 Rural policies are changing in response to these forces, and many wider policies (especially macroeconomic policies and social policies) also have pervasive impacts upon rural areas. For example, many countries in Europe recently experienced protests about the impact of high fuel taxes on those living in more isolated locations and in heightening social exclusion more generally in rural areas. Again, the Minimum Wage might be expected to have made a special impact on the typically low-wage labour markets of rural Europe (Phimister, Theodossiou and Gilbert, 2000). Planning and housing policies have already been mentioned above.
- 14 Social policy and welfare reforms are particularly important in addressing inequalities and in offering support and opportunities to the most disadvantaged. In Britain, the social chapter of the Maastricht Treaty has been introduced, and the Labour government's welfare reforms have sought to provide both incentives and pathways towards labour market integration, facilitated by the expansion of the economy and an associated increase in the aggregate demand for labour. Its 'New Deal' has sought to address, in the first instance, the integration of young people into work and this has faced particular obstacles and challenges in rural areas, notably arising from the small size of rural firms, the distances involved, and the low levels of skills required. There are also challenges in delivering personal counselling (the gateway to the New Deal) in some rural areas. The New Deal is now being extended to several other groups including lone parents, and those of working age over 50. Unfortunately, there is strong evidence that awareness of welfare entitlements, and take-up rates, are lower in rural areas. Similar

national policies operate in most countries of the EU, following the requirement for National Action Plans to address unemployment, as agreed at the Luxembourg summit.

- 15 European policies are particularly important in relation to agriculture and rural development. Farmers receive very large subsidies, as noted above, and indeed agricultural spending dominates the EU's expenditure. A reform of the EU's Common Agricultural Policy (CAP) has recently been agreed and this will reduce price support, tariffs on imports and export subsidies while partially compensating farmers for these through enhanced direct payments. Increasingly these will become linked to environmentally sensitive farming and to areas facing particular hardship (eg. less favoured areas). Further reforms appear inevitable, in the context of EU enlargement and World Trade Organisation (WTO) negotiations, with declining support to farmers unless linked with rural development or environmental goals.
- 16 Agreement has also been reached on reforms to the EU structural funds, which will be focused on fewer areas of the EU-15. The most generously funded areas (Objective 1) with 69% of the funds are those lagging behind economically, and include a number of rural areas. The former 5b areas of rural decline, however, have been reduced both in area and in budget under the new Objective 2 (11.5% of the budget). In both types of designated area, delivery is typically through a partnership structure and an integrated programming document. A new development is the Rural Development Regulation, which will apply to all rural areas, and is intended to become "a second pillar of the CAP" promoting rural diversification, as well as more environmentally-friendly agriculture. This will be implemented in different ways in different member states.
- 17 During the 1990s there has also been a tendency across Europe towards an increasing emphasis on capacity-building and community involvement in rural policy, informed by the EU's LEADER pilot initiative on rural development¹. It is claimed, officially, that such an approach will permit innovative solutions to be developed for rural problems, by combining three elements: a territorial basis; the use of local resources; and local contextualisation through active public participation. Endogenous development of this form is seen as building the capacity of localities or territories to resist broader forces of global competition, fiscal crisis or social exclusion. To some extent, this similarity of approach to rural development may reflect a Europeanisation of member states' rural policies (Shortall and Shucksmith, 1998). But how do these forces for change connect with the individual experiences of people living and working in rural areas? To answer this, we must turn to the concept of social exclusion, which has been aptly described by Byrne (1999) as the intersection of history and biography.

Conceptualising social exclusion

- 18 In recent years, policy debates about inequality have tended to focus on social exclusion rather than on poverty. The concept developed out of the EU anti-poverty programme (Room, 1995), and has been widely adopted. For example, in Britain tackling social

exclusion was an immediate priority of the Labour Government in 1997 and its newly established Social Exclusion Unit.

- 19 The concept of social exclusion is contested, nevertheless, and no single agreed definition exists. The term has been used in three competing ways in current policy debates (Levitas, 1998):
 - an “integrationist “ approach in which employment is seen as the key integrating force, both through earned income, identity and sense of self-worth, and networks;
 - a “poverty “ approach in which the causes of exclusion are related to low income and a lack of material resources;
 - an “underclass “ approach in which the excluded are viewed as deviants from the moral and cultural norms of society, exhibit a “culture of poverty” or a “dependency culture” and are blamed for their own poverty and its intergenerational transmission.
- 20 These have been summarised as ‘no work’, ‘no money’ and ‘no morals’ respectively. This paper takes an amended integrationist approach in the belief that this offers the most potential for developing an understanding of processes of social exclusion, but that these processes extend far beyond the labour market and indeed are multi-dimensional (Shucksmith and Chapman, 1998).
- 21 Poverty is usually viewed as an outcome, denoting an inability to share in the everyday lifestyles of the majority because of a lack of resources (often taken to be disposable income). In contrast, social exclusion is seen as a multi-dimensional, dynamic process which refers to the breakdown or malfunctioning of the major systems in society that should guarantee the social integration of the individual or household (Berghman, 1995). It implies a focus less on “victims” but more upon system failure, and especially on the processes which cause exclusion. It also acknowledges the importance of the local context in such processes. Thus, while the notion of poverty is distributional, the concept of social exclusion is relational.
- 22 A particularly fruitful way of viewing processes of social exclusion and inclusion is as overlapping spheres of integration². In a similar approach to Kesteloot (1998), Duffy (1995) and Meert (2000), Reimer (1998) argues that it is helpful to distinguish the dimensions of social exclusion according to the different means through which resources are allocated in society. He proposes four systems, however, which capture better the different processes which operate. They are as follows: 1. Private systems, representing market processes 2. State systems, incorporating authority structures with bureaucratic and legal processes 3. Voluntary systems, encompassing collective action processes 4. Family and friends networks, a system associated with reciprocal and cultural processes
- 23 One’s sense of belonging in society, as well as one’s purchase on resources, depends on all these systems. Indeed some have argued that these form the basis of citizenship.
- 24 This attempt to view processes of social exclusion and inclusion in terms of a series of overlapping spheres of integration, according to the means through which resources and status are allocated in modern society, may also be related to various social theories. As Leisering and Walker (1998) observe, “modernity implies the institutionalisation of the ‘individual’, the ‘self’ and the ‘life course’ as new social entities. In pre-modern times a person belonged entirely to one social setting: a local community, in which several social functions were fused. In modern times, processes of ‘functional differentiation’ described by Parsons (1966) and Luhmann (1977) and ‘social disembedding’ as depicted by Giddens (1991) have dissociated social relationships from local contexts. In this way the individual

has emerged as a separate social unit that must coordinate activities in diverse social spheres that are differentiated by function.” Luhmann, in particular, has developed an analysis of society in terms of overlapping and interacting systems. This analysis also recalls Polanyi’s seminal work (1944) on household survival strategies in relation to three spheres of economic integration: market exchange; redistribution, based on deference or “associative relations”; and reciprocity. Thus, Polanyi argued that the main form of transaction other than the market is reciprocity based on mutual affection and love, most notably within the family or household³. Reimer also relates his suggested four systems to the work of Fiske (1991), who proposed four “elementary forms of human relation”, namely market pricing, authority ranking, equality matching and communal sharing. Such a conceptualisation of social exclusion in terms of the means by which resources and status are allocated in society in turn requires an analysis of the exercise of power.

- 25 Early research into disadvantage in rural Scotland (Shucksmith *et al.*, 1994, 1996), together with Cloke *et al.*’s rural lifestyles studies in England and Wales, identified processes of exclusion operating differentially in many rural areas of Britain. Labour markets and housing markets were instrumental in generating inequality and exclusion, with many respondents perceiving very restricted opportunities for well-paid, secure employment or for affordable housing, while at the same time these markets enabled affluent households to move into rural areas. Young people and women tended to have the fewest options. These impediments to inclusion were closely bound up with failings of private and public services, most notably transport, social housing and childcare. Moreover, the welfare state was patently failing to reach potential recipients and the take-up of benefit entitlements was low. Access to advice and information in distant urban centres was problematic, and respondents were often confused about the benefits available and their entitlement. To mitigate these failings of markets and state, there was a greater reliance on the voluntary sector (which was itself under pressure as volunteers - mainly women - declined in number) and on friends and family. However, migration and the loss of young people, also related to housing and labour market processes, ruptured informal support networks and left elderly people socially isolated. This analysis is elaborated in Philip and Shucksmith (1999).
- 26 In this way, the very processes which support the economic restructuring and gentrification of many rural areas, allowing rural areas to “share in the nation’s prosperity”, have also created social exclusion and inequality. The way in which social exclusion has been conceptualised in this section holds out the hope of being able to connect the macro-level forces which operate to structure disadvantage and inequality with the microlevel experience of individuals in rural areas - that is, of being able to relate history to biography. The remaining sections of this paper examine in more detail a number of arenas (income and employment, welfare benefits, and access to housing) with which to illustrate the operation, and interaction, of these systems of inclusion and exclusion. These draw on research which has recently been funded and published under the Joseph Rowntree Foundation’s Action in Rural Areas research programme, for which this author was programme director (see Shucksmith, 2000b).

Incomes in rural Britain: poverty amongst affluence

- 27 Most previous research into rural poverty has emphasised counting the numbers of poor or disadvantaged people at a point in time. Yet, it is not enough to count the numbers and

describe the characteristics of the socially excluded. It is also necessary to understand and monitor the processes of social exclusion and to identify the factors that can trigger entry or exit from situations of exclusion (Leisering and Walker, 1998), using quantitative analysis of longitudinal panel surveys and/or qualitative methods to follow the dynamics of change.

- 28 The focus of this section is therefore on dynamic processes, and the identification of “bridges and barriers” to exclusion and integration. In rural areas there had been very little, if any, research of this type until this programme. For example, we had no knowledge of whether those individuals found to be experiencing poverty in rural England in 1980 were the same people identified in a survey in 1990. Were we dealing with short spells of poverty experienced by many people in rural society, or long spells of poverty experienced only by a small minority? This is of fundamental importance not only in terms of individual strategies but also in terms of the degree of solidarity within society.
- 29 It is also important that, in analysing these processes one by one, we do not neglect the joined-up experience of each person’s life. Two brief accounts of people’s lives are therefore presented at this point to illustrate how markets, state, voluntary systems and family and friends intertwine in complex ways within people’s individual lived experiences, promoting inclusion or creating exclusion. Car dependency, market and state allocation of housing, labour markets, education, training, childcare, family and friends are all relevant to these people, who live in rural Scotland, and structure the choices open to them and the quality of their lives.
- 30 Jane was brought up in a village and wishes to continue living there because her family is nearby and her child is established in the local school. Jane has embarked upon a degree course at the nearest college, and has been awarded a grant. Although there is a local bus service, she would need to take several buses in order to get to college, with a lengthy journey each way. Because she is a single parent, Jane could not leave home on the only morning bus since she has to get her child ready for school, and in the evenings after school she would have to pay a childminder. As a result, Jane has had to buy a car, which she cannot really afford, and it is old and unreliable, requiring a lot of maintenance. Jane struggles to survive, and she feels that her grant would go a lot further if she were not living in the village, but also feels that she should not be forced to move away from family support and the school in which her child is settled.
- 31 Margaret and her husband live in a tied cottage (i.e. rented from their employer), in a remote area. They do not have a large income, but as they live a spartan lifestyle and almost never go out, they can survive on what they have. They were unable to afford a car until five years ago, even though they are nearing retirement age, and this has been a barrier to Margaret seeking employment. They rarely go on holiday, and Margaret has never been out of Scotland. When Margaret’s husband retires they will have to leave their tied house (because the tenancy is linked to his employment) and then rely solely on the state pension. They know they will never be able to afford to buy a house, and will have to seek social housing, perhaps far away in a town. Despite all this, they see themselves as well off, because compared to their parents’ time, and to the early days of their marriage, they are very fortunate.
- 32 As part of the JRF research programme, an analysis of rural households in the British Household Panel Survey (BHPS)⁴, followed the same randomly-selected 7,164 individuals

each year between 1991-96, to help answer the questions posed above (Chapman *et al.*, 1998). Overall, the results suggest that not only are proportionately fewer individuals affected by low income in rural areas (37% below three-quarters mean income in rural areas at any one time, compared to 45% elsewhere), but that spells of low income tend to be shorter with the proportion of those who are 'persistently poor' significantly less. Despite this favourable comparison, prosperity is far from universal in rural Britain: a third of individuals in rural areas experienced at least one spell where their income fell below half mean income, and 54% experienced a spell with income below three-quarters of mean income during these 5 years. Moreover, gross income inequalities intensified in both rural and non rural areas over that period, which was characterised by major economic restructuring and cuts in public spending driven by the neo-liberal policies of the Conservative government. The over 60 age group was significantly more likely to suffer persistent low income whether in rural or non rural areas.

- 33 The analysis also confirms that the relative prosperity of rural households in Britain is not so much the result of strong rural economies but rather of selective migration. Richer people are moving into, and poorer people are moving out of, rural areas so causing a progressive gentrification of the countryside. Far from showing that rural people are part of an increasingly prosperous "one nation", rising rural prosperity is an indication of an increasing spatial divide within Britain, described even in 1973 as "this very civilised British version of apartheid" (Hall *et al.*, 1973). Related research by Bate, Best and Holmans (2000) confirms that there is a socially-selective and age-selective drift out of the towns and cities to the suburbs and rural areas, with only the relatively wealthy achieving the widespread dream of a house in the country, while the less well-off can only move to the outer or inner suburbs, or remain in the inner city. This issue, and the power relations which underlie it, are discussed further below.
- 34 While there is no evidence in Chapman *et al.*'s work that the probabilities of escaping from low income are different between the rural and non-rural BHPS sub-samples, it seems that those in rural areas are at less risk of falling back into low income once they have left it than those in non rural areas. The results also suggest that migration from rural areas does not increase the probability of escaping from low income, and in fact may increase the chances that an individual moves back onto a low income, at least temporarily. Overall, migration is associated with an increase in both upward and downward income mobility.
- 35 Another interesting, and more surprising, finding is that there are significant rural/ non-rural differences in the demographic and economic events associated with escape from and entry into low income. A far smaller proportion of exits from rural poverty are accompanied by an increase in the number of earners in the household, or by a change in household composition. This distinctive pattern is repeated when entry into poverty is considered, being associated far less in rural areas with a fall in the number of earners (eg. following job loss or pregnancy), a change in family economic status (eg. retirement), or a change in household composition (eg. marital breakdown). This raises the question of what other 'triggers' and 'trampolines' operate in relation to movements into and out of poverty in rural areas.
- 36 Low incomes in rural areas have often been blamed on low pay, related to smallfirms, lack of unionisation, and low skills. The research found only a weak relationship between low income and low pay, and far more association between poverty and detachment from labour markets, despite the low levels of registered unemployment. Few of those on low

incomes in rural areas are low paid, because few are in work. The greatest number are older people. Of those of working age on low income in rural Britain, only 22 per cent are in employment; 23 per cent are self-employed (far more than in non-rural areas); 13 per cent are unemployed; and 41 per cent are detached from the labour market in other ways (e.g. long-term sick (male) or family carers (female)). The composition of low income households differed significantly between rural and non-rural areas with, for example, the self-employed a much more significant component of rural low income households than is found in non-rural areas. The processes behind these statistics are discussed in detail in the next section, but it can be seen that they derive from the global penetration of local labour and product markets, state privatisation and deregulation.

- 37 The principal groups experiencing poverty in rural Britain are, therefore: • elderly people living alone (predominantly elderly widows) and elderly couples, often relying solely on the state pension - this is by far the largest single group;
- low-paid, manual workers' households: rural areas do contain a disproportion¹⁷⁴ Social exclusion and poverty in rural areas of Britain ate number of people in low-wage sectors, notably agriculture and tourism, and in small workplaces;
 - those detached from labour markets, either formally unemployed, or registered as long-term sick or disabled: half of all males in this category are aged 55-64;
 - self-employed people: a major source of rural poverty among those of working age.
- 38 As elsewhere, the principal axes of inequality are social class, age and gender. The most challenging finding of the research on disadvantage in rural Scotland (Shucksmith *et al.*, 1994, 1996) was that rural people's own assessment was at odds with official definitions of poverty. Most looked back on the improvements since their own childhood, when they lacked running water, electricity and TVs, and so could not conceive of themselves as poor. This is reinforced by the obstacle of the rural idyll.
- 39 "The rural idyll conceals poverty... the poor unwittingly conspire with the more affluent to hide their poverty by denying its existence. Those values which are at the heart of the rural idyll result in the poor tolerating their material deprivation because of the priority given to those symbols of the rural idyll: the family, the work ethic and good health. And when that material deprivation becomes so chronic by the standard of the area that it has to be recognised by the poor themselves, shame forces secrecy and the management of that poverty within the smallest possible framework.... [At the same time] newcomers do not want to see poverty because it is anathema to the rural idyll which they are seeking to preserve" (Fabes, Worsely and Howard, 1993).
- 40 This has implications in considering ways in which such disadvantage can be corrected, both in terms of attempts at empowerment, and in how to encourage people to take-up their benefit entitlements without stigma or loss of self-esteem. Overcoming resistance to these entitlements is a fundamental task for those seeking to tackle social exclusion.

Employment: barriers and bridges

- 41 According to Berghman (1995), the three major "bridges" towards inclusion are gaining employment, changes in family or household composition, and receiving welfare benefits, but are these the same in rural areas? And what particular constraints or "barriers" are imposed by a rural context? Most poor people seek a full-time job as a route out of poverty, although this mode of escape is denied to many on account of their age, lack of

skills, or childcare commitments. Are there additional obstacles facing those in rural areas, on account of their small community, or the distances involved, perhaps?

- 42 Low pay is a particular problem. Persistent unemployment is less common but persistent low pay is more widespread in rural than in non-rural areas (Chapman *et al.*, 1998). The relatively low escape rate from low pay for individuals employed in small workplaces, combined with their dominance in rural employment, suggests that a lack of mobility from microbusinesses in rural areas may be an important explanatory factor. This was confirmed in the qualitative work by Monk *et al.* (1999) who looked at two labour markets in Lincolnshire and Suffolk with varying degrees of rurality. They found the following bridges and barriers to labour market participation:
- 43 Barriers to finding employment:
- Structure of local labour markets - mismatches between jobs and skills
 - Employers' behaviour and attitudes - recruitment through informal social networks
 - Inaccessibility between home and workplace, and especially car-dependency
 - Costs of participating in the labour market - childcare, eldercare and the benefits trap
 - Bridges to labour market participation:
 - Formal job search strategies or linking into local networks
 - Transport solutions - eg. a works bus, car sharing
 - Training - but often a mismatch between local training opportunities and jobs
 - Childcare solutions - usually informal (eg. shift-working, home-working, relatives.)
 - Support networks and the informal Economy.
- 44 For some, integration into paid employment can resolve their poverty, perhaps with help from the extension of the New Deal to people over 50 together with related policy initiatives directed at transport, childcare and eldercare services. For others it is the level and take-up of state benefits which offers the only prospect of escaping low income.
- 45 Work by Beatty and Fothergill (1997, 1999) for the Rural Development Commission has found evidence of substantial hidden unemployment in rural areas, especially among men. Much of this took the form of premature early retirement and (in particular) a diversion from unemployment to long-term sickness. Distinctively rural dimensions to the problem of joblessness included the difficulties of 'getting to work', the narrow range of jobs available, the low level of wages on offer, and ageism among employers. More recently these authors (Breeze *et al.*, 2000) have investigated in what ways the New Deal programme needs to be adapted to rural circumstances. Their principal conclusion is that while New Deal addresses the supply side of labour market integration, it is demand side problems (i.e. a lack of jobs) which remain deeply entrenched in rural labour markets. "Put simply, the main reason why so many men remain out-of-work is that there aren't enough jobs to go to." Moreover, the jobs which are available offer low wages which provide no incentive to come off benefit, even with the newly-introduced Working Families Tax Credit (WFTC). The other distinctively rural barrier to finding work, found in this study, is transport, experienced by those without regular access to a car and especially by those without a driving licence. The authors suggested that New Deal in rural areas should support access to cars among those looking for work. Encouragingly, while Job centres attracted "a torrent of criticism", New Deal advisors were regarded much more positively by those who had personal interviews.

Welfare entitlements

- 46 The majority of those of working age facing low incomes in rural Britain experience poverty for relatively short spells, during which the level of benefit and other welfare payments may be crucial in assisting them to cope (Chapman *et al.*, 1998). There is no evidence of welfare dependency in rural areas, and on the contrary people are eager to find work. There is, though, evidence that low levels of wages combine with means-tested benefits and other costs (transport and childcare) to create significant disincentives to accept work. Breeze *et al.* (2000) found that jobs at the national minimum wage (NMW) may be a realistic option for single men and women, especially if living with their parents, but that they would leave those with families financially worse off. Men with significant family responsibilities “typically receive a package that includes income-based Jobseeker’s Allowance for themselves, their partner and children, Housing Benefit, Council Tax Benefit and free school meals.” All these are means-tested and, even with the WFTC, they would be substantially worse off accepting a job at the NMW. To address this benefits trap it is insufficient to focus on the supply side of the labour market: the creation of better quality jobs in rural areas, with higher wage rates, is required.

Access to advice and information

- 47 Receipt of welfare benefits is of crucial importance to households of working age during their typically short spells of poverty or unemployment, then, and for older people who form the largest group experiencing low income in rural areas. However there is clear evidence that take-up rates are lower in rural areas (Gordon *et al.*, 2000), and that there is a pressing need for better access to information and advice about state benefit entitlements. The study of disadvantage in rural Scotland (Shucksmith *et al.*, 1994, 1996) found that the uptake of benefits was much lower than would have been expected, given the low incomes of many respondents. Respondents were often confused about the benefits that were available and their entitlement. Access to advice in urban centres was problematic, with benefit offices seen as highly intimidating quite apart from the social stigma of claiming. Other studies in the UK have confirmed these findings.
- 48 The culture of independence and self-reliance in rural areas would appear to be an important factor mitigating against the collection of state benefits. Individuals were reluctant to claim benefit, seeking instead a second or third job, or preferring to live a more spartan existence. Apart from culture, there is a lack of anonymity in collecting benefits (usually at the village post office) and a greater distance to, and general paucity of, information and advice about eligibility for benefits. Social housing is lacking in rural areas, whereas in urban areas it offers an effective channel for information on benefits and rights to reach those eligible for state support. There is therefore a considerable challenge in attempting to increase the uptake of benefit entitlement in rural areas. Equally, improved uptake could make a powerful impact on poverty in rural areas. Henderson and Gibson (1997) reviewed the services offered by the Benefits Agency, local authorities, Citizens’ Advice Bureaux and independent advice agencies in rural Scotland, and found no overall strategy for the provision of advice and access to welfare benefits, nor any strategy for implementation in rural areas. Policy and practice in rural areas was

secondary, departmentalised and ad hoc. Nevertheless, there was strength in the energy and skills of the many people working with voluntary agencies, which compensated for the shortcomings of the state systems and for this lack of integration. They concluded that the fundamental structures for improving advice and information in rural areas exist. What was needed was a more strategic approach and a rural focus, rather than major restructuring or a major shift in policy.

Pensions

- 49 One of the most striking findings of the BHPS analysis (Chapman *et al.*, 1998) is how many of those on low incomes in rural areas are beyond working age and reliant solely on the state pension. The level of the pension is therefore of overwhelming importance to their income levels and to their quality of life. Increasing the basic level of pensions is the single measure which would have the greatest impact in addressing poverty and social exclusion in rural areas. In addition, a special effort is required to reach elderly people relying only on state pensions and unaware or unconvinced of their welfare entitlements, and to inform them of these in a sensitive and appropriate way. Specific policy changes also impact adversely on elderly people in rural areas, such as increased fuel prices and the diversion of business from sub post offices, and thought should be given to how to mitigate such effects. This social group is highly reliant on state systems, and (to a decreasing extent) on friends and family.

Housing

- 50 The supply of affordable rural housing, whether through market, state, voluntary or kinship systems, has long been identified as essential to the vitality and sustainability of rural communities. It is also crucial to the life chances of many of the less prosperous members of rural societies, and to the socially inclusive character of the countryside. Unfortunately, affordable housing is sadly lacking in many rural areas of Britain. The Countryside Agency and many others have identified the lack of affordable housing as the most important issue facing rural communities in England, and there is equally compelling evidence from Scotland and Wales.
- 51 A recent report from the Rural Development Commission (RDC 1999) begins in this way:
- 52 “Everyone should have access to a good quality, affordable home, but increasingly this opportunity is denied to people on lower incomes in England’s rural areas. Lack of affordable housing not only affects individuals and families, but also undermines the achievement of balanced, sustainable, rural communities. The RDC believes that there is an urgent need to tackle the problems of providing affordable housing in rural areas to ensure that there is a sufficient supply of suitable housing for rural people. Without action now rural England will increasingly be home only to the more affluent, and living, working villages will become a thing of the past.”
- 53 This is confirmed by the analysis of the BHPS (Chapman *et al.*, 1998) which, as noted above, reveals progressive gentrification of rural areas as the more affluent dominate the housing market. To understand better the lack of affordable housing in rural Britain, and the related social exclusion and social changes, one needs to consider the nature of, and influences on, the demand, supply and stock of housing in rural areas, and the roles of all four systems of market, state, voluntary, and family and friends. While there are

important variations from one area to another in the ways in which these forces operate (documented in a classification of housing markets in rural England by Shucksmith *et al.*, 1996b), it is possible to summarise the general position.

- 54 As in the rest of Britain, the growing number of single person households and the increase in elderly people living apart from their families has increased the demand for housing. The demand in rural areas has, in addition, been augmented by the desire of many town-dwellers for a house in the country. At the same time, supply restrictions (notably planning controls) have permitted relatively few to realise the widespread desire for rural home ownership, and the resulting increase of house prices has caused problems for a sizeable proportion of the indigenous rural population and for potential low income rural dwellers. The evidence suggests that 40% of new households in rural areas are unable to afford home ownership through the open market.
- 55 As Newby (1985) elaborated, several years before the term social exclusion was coined:
- 56 “As prices inexorably rise, so the population which actually achieves its goal of a house in the country becomes more socially selective. Planning controls on rural housing have therefore become - in effect if not in intent - instruments of social exclusivity.”
- 57 The planning process has become the arena for a political conflict between those who favour countryside protection and those who seek ‘village homes for village people’ and this has become more acute in recent years. Paradoxically, it may be that those most avidly protecting (their own) perception of the ‘rural idyll’ are, by token of the effect on the housing market, inadvertently threatening the social, cultural and economic sustainability of what they are so keen to preserve. In this way the operation of state systems of bureaucracy and authority, manipulated by powerful interest groups (see Shucksmith 1990b), works through housing markets to systematically force up house prices and thus exclude less wealthy households from many rural areas.
- 58 A recent study (PIEDA 1998) confirmed that the majority of new housing in rural areas of Britain is built by the private sector for the upper end of the market. The combination of increasing demand, restricted supply and insufficient stock of rented housing has resulted in a deficit of rural housing both in quantitative terms and also in terms of affordability for lower and middle income groups. The study concluded that these trends were likely to continue.
- 59 Very little private housing in Britain is rented, and research suggests that this stock is unlikely to increase. As a result, the vast majority of those unable to afford house purchase in rural Britain must depend on social housing provision by the voluntary sector (housing associations) and local authorities. In each case this is allocated according to assessed need. However, social housing in rural areas is lacking, accommodating only 15% of households. Partly this is a historical legacy of the dominance of rural areas by conservative councils who tended not to build council houses to the same extent; partly it is the result of social housing investment being concentrated in urban areas by the state bodies which finance voluntary sector housing (the Housing Corporation, Scottish Homes and Tai Cymru); and partly it is a result of the Conservative government’s policy during the 1980s and 1990s of mandatory council house sales at substantial discounts which has transferred the social housing stock to the private market at much higher rates in rural areas. This clearly privileges those with ability to pay to the exclusion of those who exhibit housing need. A number of studies have found that the problems of affordability

in rural areas have worsened over the last decade. One clear reason for this has been the substantial shortfall of provision of social housing. Compared with an estimate that 80,000 affordable homes were needed in rural England between 1990-95, from 1990- 97 only 17,700 new social housing units were provided, largely through the Housing Corporation's Special Rural Programme (RDC 1999). Even this contribution was offset by continuing discounted sales of social housing under the right-to-buy.

- 60 Pavis *et al.* (2000), echoing the other studies in the JRF programme, found that the young people they studied "were neither wealthy enough to buy, nor were they poor enough to qualify for the limited public sector provision." One result of these difficulties is delayed household formation, with by far the majority of young people in rural areas, in contrast to elsewhere in the UK, remaining in the parental home. Although most were initially happy living with their parents, close to friends and family, problems became apparent later as they sought to assert their independence or when they found partners. At this stage their local housing opportunities were so limited that they had to leave, and Rugg and Jones (2000) found that "almost all ended up living in urban areas." At the age of 22, only one or two of the 60 they interviewed in North Yorkshire had succeeded in achieving any level of independence while staying in a rural location. For the great majority, here and in the other study areas in the JRF programme, the only solution to their housing and employment problems was to leave the countryside. The operation of market and state systems thus combines in this case to rupture kinship and friendship networks.
- 61 Bevan *et al.*'s (2001) study of social housing in rural areas confirms the very limited opportunities for affordable housing in most rural areas. "The scarcity of alternatives to owner-occupation in many rural localities combined with high prices, particularly in areas with an intense demand for housing, meant that even households on quite moderate incomes are priced out of the market." In this study, tenants of social housing reviewed their previous housing experiences and searches, emphasising not only that they were unable to buy a home anywhere in their area but also that private renting was prohibitively costly and too insecure for families. For a fortunate few, social housing enabled them to stay within a particular village where they had lived for some time or had kinship ties. There were instances where new housing association developments had had a key role in enabling extended family networks to survive in a particular village. Respondents emphasised the importance of social networks in providing an opportunity to go to work while friends or relatives took on childcare responsibilities. For other respondents, social housing in the village offered them the chance of a fresh start in life, perhaps after a marital breakdown which meant they needed to find alternative accommodation but also to stay near to family and friends for support. This illustrates how state and voluntary systems can work together with friends and family networks to redress the effects of market processes, so ameliorating exclusion.
- 62 It was also clear that such housing could play an important role for households without any particular local ties, perhaps helping them to overcome an immediate crisis. This raises the issue of how far there is an acceptance of the legitimacy of broader housing needs within rural social housing schemes, and in many ways this mirrors the ongoing debate in the housing profession about the development of mixed communities and the role of allocations systems in addressing this. One local authority refused to rehouse someone who owned a garage in the village because he had not had a local connection for 5 years: as a consequence he moved away, shutting the garage and making two people unemployed. Bevan *et al.* (2001) suggest more sensitive allocations policies, looking

beyond solely housing need, may be sufficient to achieve a balance between meeting local households' requirements and allowing flexibility to enable people to move into settlements if they so choose, even if they lack local connections. This may also require much more joint working between housing associations, local authorities and others.

Conclusion

- 63 In relation to market processes, this paper has highlighted the barriers which face those seeking integration into changing rural labour markets, and especially the shortage of well-paid, better quality jobs. In the course of globalisation, international capital seeks to exploit those rural areas characterised by low wages, a non-unionised workforce, and lower levels of regulation, leading to increased casualisation and job insecurity, and this necessarily causes exclusion for some. Other rural areas, and other individuals, are able to compete on the basis of quality through continuous innovation, cultural and social capital, and enjoy greater power and com- Social exclusion is not confined to the most visibly poor council estates, nor even to the cities and towns. Despite the relative affluence of many rural areas, one in three individuals in rural Britain experienced at least one spell of poverty during 1991-96, albeit typically of short duration, and there is compelling evidence of other processes of social exclusion. Low pay is more common and more persistent in rural areas than elsewhere. There is considerable inequality hidden amongst the apparent affluence of rural Britain, and those who are socially excluded in one way or another may face particular difficulties because of their very invisibility. mand over resources. This is one instance of the intersection of history and biography which this paper has set out to explore, as market forces hold greater sway in relation to individual lives and life chances.
- 64 Another illustration of this may be found in the difficulties many face in finding affordable housing, whether through market or state, to such an extent that they may be spatially excluded from living in many rural areas of Britain. The voluntary sector has been placed under increasing pressure as a result, while also becoming steadily incorporated into state systems though reliance on state funding and new forms of regulation. These intersecting spheres of social exclusion in turn have consequences for kinship networks and social support, as young people have to move away in search of affordable housing, higher education and better-paid employment. In these ways different dimensions of social exclusion interact to reinforce inequalities within rural areas, and between rural and urban areas. Perhaps most interestingly, the effects on individuals can be seen of the ascendancy of market processes, and the waning of state systems, as a result of the neoliberal hegemony which has hastened deregulation, privatisation, reductions in public expenditure and global capital's penetration of labour and product markets. These effects vary from place to place, and from person to person, but in rural Britain a substantial number face social exclusion as a result - whether from casualisation and job insecurity, from eroded pensions, or from delayed household formation and a lack of access to affordable housing. These changes in market and state systems also place considerable strain on voluntary systems, for example through feminisation of the workforce and through additional reliance on volunteers, and on friendship and kinship networks, as noted above. One high priority for future research should be to elaborate further how the changing relative importance of these systems, by

which resources are allocated, impinges differentially on people and places, urban or rural.

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NOTES

1. See the April 2000 special issue of *Sociologia Ruralis*, 40, 2.
2. See Philip and Shucksmith (1999) *Conceptualising Social Exclusion*, Paper to European Society of Rural Sociologists' XVIII Congress 'How to be Rural in Late Modernity', Lund, Sweden.
3. Shortall (1999, 32) has pointed out that this often permits exploitation of women in farm families, since such reciprocity exists alongside a very unequal relationship of economic and social power. Indeed, she argues "one of the shortcomings of Polanyi's concept of reciprocity is its lack of any perspective on power."
4. More details are given in P Chapman, E Phimister, M Shucksmith, R Upward, E Vera-Toscano (1998), *Poverty and Exclusion in Rural Britain: the dynamics of low income and employment*, York Publishing Services.

ABSTRACTS

This paper discusses the ways in which economic, social and political forces for change operate in rural areas to produce social exclusion for some people and social groups. After a brief review of these forces for change, as they operate across Europe, the paper turns to consider the meaning of the term "social exclusion" and how the experiences of individuals and social groups might be related to such forces. Following this, the paper draws on a number of recent empirical studies to illustrate how social exclusion operates in rural areas of Britain. The paper draws attention to the effects on sustainable livelihoods of the ascendancy of market processes, and the waning of state systems, as a result of the neo-liberal hegemony which has hastened deregulation, privatisation, reductions in public expenditure and global capital's penetration of labour and product markets.

Cet essai traite des manières à travers lesquelles des forces économiques, sociales et politiques opèrent dans les régions rurales et produisent l'exclusion sociale de certaines personnes et groupes sociaux. Après un bref aperçu de ces forces de changement, telles qu'elles opèrent à travers l'Europe, cet essai se penche sur la signification du terme 'exclusion sociale' et sur la façon dont les expériences d'individus et de groupes sociaux pourraient être mises en rapport avec de telles forces. Ensuite, l'article se base sur plusieurs études empiriques récentes pour illustrer comment l'exclusion sociale agit dans des régions rurales de Grande-Bretagne. Cet essai attire l'attention sur les effets sur la subsistance matérielle durable de la suprématie des processus de marché et du déclin des systèmes étatiques suite à l'hégémonie néolibérale. Celle-ci a accéléré la dérégulation, la privatisation, la réduction des dépenses publiques et la pénétration du capital global dans les marchés de main-d'œuvre et de produits.

INDEX

Mots-clés: pauvreté, exclusion, rural, Grande-Bretagne, inégalité

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