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# COMMUNITY AND SPATIAL ASPECTS OF EXCLUSION IN LATER LIFE

**The ROSEnet Community and Spatial Working Group**

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Kieran Walsh and Thomas Scharf**

# Prologue

Everything that happens, happens somewhere, in some physical space. The socio-physical context therefore represents a basic framework for all social interactions. In an ideal world everyday surroundings should be open, safe, barrier free, inviting, aesthetic, green, healthy and pleasant, comfortable, both peaceful and entertaining, supportive, stimulating, and inclusive to all. Across the world, considerable energy, financial resources, planning and action has been invested to achieve such ideals. However, there are still groups and individuals who do not have the opportunity, agency, capital, or strength to enjoy what the given environment has to offer and/or, by various forces, experience a more restricted form of participation within these environments. People may be or may feel socially excluded **by** such spaces, places and communities, or be and feel excluded **in** them.

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# Introduction

Older people can experience challenges and limitations arising from physical changes (e.g. growing fatigue, loss of balance), cognitive and psychological changes (e.g. Alzheimer's Disease or other forms of cognitive impairment, fear of falling), and social changes (e.g. retirement, loss of friends, bereavement). As a result, older adults' everyday routines becoming more centred around their immediate neighbourhoods, communities, and dwelling (see Figure 1 below), i.e. ageing can lead to a reduction of individuals' action radius. Experiences in later life can therefore be increasingly dependent upon the quality of an older person's immediate social and physical surrounding. The range of connections that older people can accumulate to their community over time can also mean that places may be particularly important for a sense of identity, belonging and continuity in older age. These patterns and relationships illustrate why community and spatial aspects of exclusion in older age are so important to consider.

It is reported that the majority of older people prefer to age in place and as such "ageing in place" has become a priority policy agenda for many countries. However, when considering the challenges of community and spatial exclusion, it may be more relevant to focus on "ageing in a good place". In this Brief, we will provide a summary of current knowledge on community and spatial aspects of social exclusion in later life, identifying gaps in research and policy, and outlining opportunities for future policy to reduce this form of exclusion.

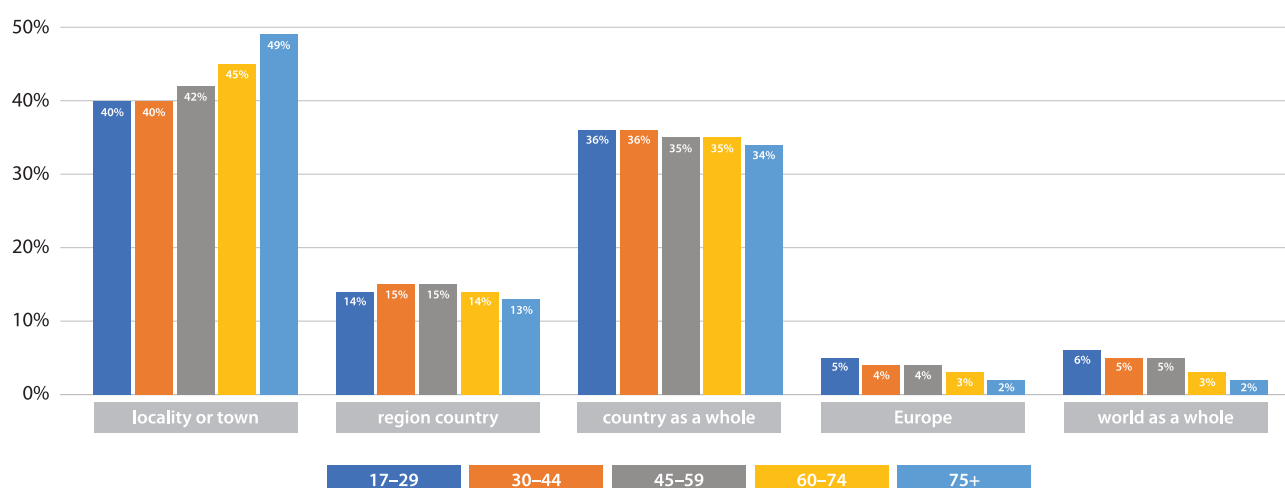
Social exclusion affects both the quality of life of older individuals and the equity and cohesion of an ageing society as a whole (Adapted from Levitas et al., 2007 in Walsh et al., 2017, p. 83). It is therefore crucial to address social exclusion from community and spatial perspectives in order to achieve more inclusive, age- and ageing-friendly societies (WHO, 2007). The aim of this Policy Brief is to assist those who are keen to achieve this ambitious goal.

## ***"Old-Age Social Exclusion***

*is a complex process that involves interchanges between multi-level risk factors, processes and outcomes. Varying in form and degree across the older adult life course, its complexity, impact and prevalence are amplified by old-age vulnerabilities, accumulated disadvantage for some groups and constrained opportunities to ameliorate exclusion. Old-age exclusion leads to inequities in choice and control, resources and relationships, and power and rights in key domains of neighbourhood and community; services, amenities and mobility; material and financial resources; social relations; socio-cultural aspects of society; and civic participation. Old-age exclusion implicates states, societies, communities and individuals."*

**Walsh, Scharf & Keating, 2017, p.93**

**Figure 1: To which geographic group do you belong the most? (by age group)**



Source: European Value Study 2008; Question Q69; whole sample, 38 countries; own calculations.

## What is exclusion from community and space?

For the purpose of this Brief, we define spatial and community exclusion as the unintended reduction of mobility outside the personal home (spatial component) and of participation in local life (community component). Walsh (2018) refers to place-based exclusion, where place is not only a location of disadvantage but represents one of the crucial domains of a person's life. Here, five interrelated dimensions can be identified from the international literature (for details please see Walsh et al. 2017):

1. **Services, amenities** and the **built environment** can encompass exclusion from, or as a result of, lack of services and physical infrastructure in place. This relates to issues such as health care and home care availability, transportation frequency, quality, and accessibility; housing options; and walkability (e.g., Engels & Liu, 2011; O'Shea, Cahill, & Pierce, 2015; Srakar, Hrast, Hlebec, & Majcen, 2015).
2. **Socio-economic aspects** of place point to structural disadvantages of materially and socially deprived areas. As older people tend to (or prefer to) age in place, and age-related physical changes tend to considerably decrease one's mobility over time, older residents are at greater risk of long-term effects arising from exposure to such issues as poverty, crime, unemployment, but also water, air and soil pollution (e.g., Berthoud, Blekesaune & Hancock, 2009; Heap, Lennartsson, & Thorslund, 2013).
3. **Social and relational aspects** of place draw attention to exclusion from relational communities-in-place, and how this affects social and cultural participation, social capital, cohesion and feelings of safety. Available research suggests that this dimension of exclusion has a direct link to life satisfaction or levels of loneliness. If social and relational quality of a given place is high, it can counteract the otherwise negative impacts of living in socially deprived areas and neighbourhoods. Probably more than other dimensions, social and relational exclusion in place is susceptible to the subjective definitions and perceptions of the social actors directly involved (e.g., Burholt & Scharf, 2014; Conway et al., 2013; Buffel, Phillipson & Scharf, 2013; Wahl, Iwarsson & Oswald, 2012).
4. Research on **politics in place** (or socio-political power structures) within neighbourhoods and communities illustrates how places can function politically as exclusionary instruments (Walsh 2018, p. 259). It informs how certain processes, policies and actions, or lack of policies leave older people alienated from local-level decision making. Research on this topic focuses on concepts such as spatial ageism (Peace, Holland, & Kellaher, 2005) or environmental injustice, and often documents long-lasting effects of cumulative dis/advantages in the lives of people with the intersection of various minority statuses (e.g., Buffel et al., 2014; Hirshorn & Settersten, 2013).
5. Closely linked to the previous point, **place-based policy** can generate exclusion that impacts on how the lives of older people in places are positioned and recognised (Walsh 2017, p. 259). Older people may become excluded from policy design, implementation, and/or evaluation. An example can be an "urban hegemony" in policy design where rural elders and their needs tend to be underrepresented, and/or qualities of life in rural areas are undervalued (UNECE Policy Brief, 2017). This might be exemplified in a critique of age-friendly city and community (AFCC) programmes. Critics argue that AFCC, as an unintended consequence, supports the existing disparities by its residual social welfare approach and fails to address changing environments, disregards macro forces such as urban and rural transformations and global economic conditions and fails to recognise adaptive practices employed by older people who are ageing-in-place (cf. volume by Moulaert & Garon, 2016).

## What does community and spatial exclusion mean for different groups of older people?

There is a great heterogeneity of older people and their experiences, preferences, lifestyle choices and values, as well as a great heterogeneity of places. Challenges and opportunities for active or healthy ageing, as well as for care provision, can differ in rural and urban structures, in smaller villages and villages in suburban rings, in places in mountainous areas and places at the coast, in big urban centres with high a density tourism and in smaller industrial centres in inner peripheries. This range of characteristics represents a challenge for preparing relevant policies and interventions as one-size-fits-all models are clearly not applicable. Further work is needed to explore the impact of place type on experiences of exclusion. While research on rural communities demonstrates the lack of health and social care provision, and studies of urban deprived areas highlight the impact on material disadvantage, differences in overall patterns of exclusion in later life remain unclear.

Some of the place-based challenges have harsher consequences for the **oldest old** group, where the risks of functional disabilities and frailty is higher, in terms of the hypomobility syndrome (major decrease in mobility leading to muscle deformation (sarcopenia)), psychological adaptation or in such extreme situations as evacuations during natural disasters (floods, hurricanes, etc.) or heat waves (e.g., Ng et al., 2014; Parker, Lie, Siskind, & Martin-Khan, 2016). Old age is a **gendered** experience, with more older women surviving into higher age, often in poorer objective health, on lower incomes and with higher expenditures than men in the same age group. By contrast, older men tend to have smaller support networks if divorced or widowed, which may influence their chances to enjoy their socio-physical environment or escape an unfavourable environment (Arber, Davidson & Ginn, 2003). There is also a theoretical paradox, as both those who “stay” and those who “move” can experience various forms of place-based exclusion. Those who **age-in-place** may lack capacity to move out of disadvantaged neighbourhoods or are “left behind” in some remote rural areas by the out-migration of younger people. In such situations, length of residence may be a proxy indicator for exclusion. By contrast, those who are forced to move, either as a result of gentrification processes and related increases in living and housing expenses, or otherwise experience induced **migration**, especially if the migration is transnational or transcontinental (e.g., retired migrants, moving to a new place to be closer of supporting family members) can feel alienated from their new place of residence, be excluded from the supportive services and/or experience decreased quality of life (cf. volume by Karl & Torres, 2015).

**People with dementia** (e.g., Alzheimer’s disease) should also be noted as an older adult group with higher risks of community and spatial exclusion. In 2015, it was estimated that 9.6 million of people (or nearly one in every 50 people) were living with dementia in Europe (OECD/EU, 2016). In Western Europe, the prevalence of dementia doubles for every five year, increasing from 4% at age 65 to more than 45% in ages 90+. Data from Central Europe are scarce but seem to follow the same pattern (World Alzheimer’s Report, 2015). As highlighted by Argyle, Denning and Bartlett (2017), outdoor access is often denied to people with dementia, both living at home or in care homes: *“Despite the promotion of inclusive and human rights based approaches aiming to help older people ‘to live as full lives as possible’, social exclusion persists. For people with dementia, this can be exacerbated by a combination of physical and cognitive impairments forming a barrier to outdoor access with declining memory and confidence as well as disorientation in unfamiliar settings potentially restricting this access”* (p. 1005). The development of dementia-friendly recommendations appears to be an efficient way to complete and overcome some aspects neglected in the age-friendly communities’ approach (Turner & Morken, 2016).



## What are the current research gaps?

There is growing body of research available on various aspects of community and spatial exclusion in later life. However, several major gaps in our knowledge and practices remain unaddressed. First, a considerable portion of our research evidence is based on a quantitative paradigm, focusing on a rather small number of measurable consequences of spatial exclusionary processes, especially in relation to health and wellbeing. Although these forms of analyses are important, they tend to not to provide a sufficient basis for extensive interpretations of exclusionary relationships. There is a growing need to capture intersections with wider societal and contextual factors.

Scharf et al. (2017) identified serious research gaps in terms of an “apparent lack of research examining outcomes in the living environment in later life through the lens of inequalities” (p.104). As an example, the authors see little evidence describing the presence, absence or implementation of home adaptations and their relation to different aspects of inequality either in terms of socioeconomic resources or health conditions. Similarly, housing tenure or related transitions, such as downsizing are not yet well described in the research. As the authors claim, “thinking toward future needs with respect to the broader housing market, such evidence would be important to help identify groups at potential risk of disadvantage, which in turn could help shape effective policy” (Scharf et al. 2017). Gender is a crucial aspect in experiencing ageing in general, as well as social exclusion in particular. However, limited evidence is available on these gendered experiences. Similarly, the difference in neighbourhood and community exclusion between people belonging to different birth cohorts (or the “third” and “fourth” ages), and between people with experiences of migration, including those who migrate to warmer climates for later life leisure, and those who are forced to migrate later in life for humanitarian reasons, seem to be under-researched.

Social research on the intersection of population ageing and environmental concerns is also under-developed (Wright and Lund, 2000). Pillemer et al. (2010) organised a consensus conference in 2009 to arrive at a comprehensive research agenda for the social sciences on these matters. The conference proposed three broad themes: 1) environmental threats to the health and wellbeing of older people; 2) pro-environmental behaviour and volunteerism in later life; and 3) the environmental impact of housing and living arrangements. These themes included topics such as environmental attitudes and behaviours, deeper understanding of factors facilitating involvement and reduction of the environmental footprint. In addition to the diversity of older populations, the conference participants also directed attention to the heterogeneity of the contextual geographical conditions, influenced not only by weather and climate, but also by the scope of the impact that various ecological issues may have: *‘In drier areas, fires, dust storms, and habitat loss are the most salient threats; whereas in other areas flooding, hurricanes, and tornados may be more likely. These weather events differ in terms of the health risks they present and the appropriate preparedness strategies. Similarly, housing patterns and issues vary by region. What may be ecological or environmentally conscious in one area may not be in another area....’* (Pillemer et al. 2010: 449-450).

Further, there seems to be an under-representation of non-English language texts in publications and literature reviews (see e.g. Moulaert and Garon 2016). This may hinder inter-cultural understandings and empirical comparisons, as some of the key concepts such as “community” or “neighbourhood” do not have universal/shared definitions and may from one jurisdiction to the next represent different meanings in geographical (physical), social and policy terms. The answer to questions such as “Who are your neighbours?” also differs within nation states, between rural and urban areas, between those living in suburban houses and those living in inner cities. Therefore, understanding how these categories are constructed and used, in research, policy-making and by the social actors themselves, across different contexts is particularly critical in the development of European and international policy. As knowledge is not fully inter-culturally transferable, some of the research gaps are likely to be wider in some cultural contexts than others. For example, research on rural ageing is quite well developed in the UK and Ireland but has very limited coverage in central and Eastern European countries (UNECE, 2017). A lack of interdisciplinary study, that would better mirror the complexity of the lived world, also impedes the

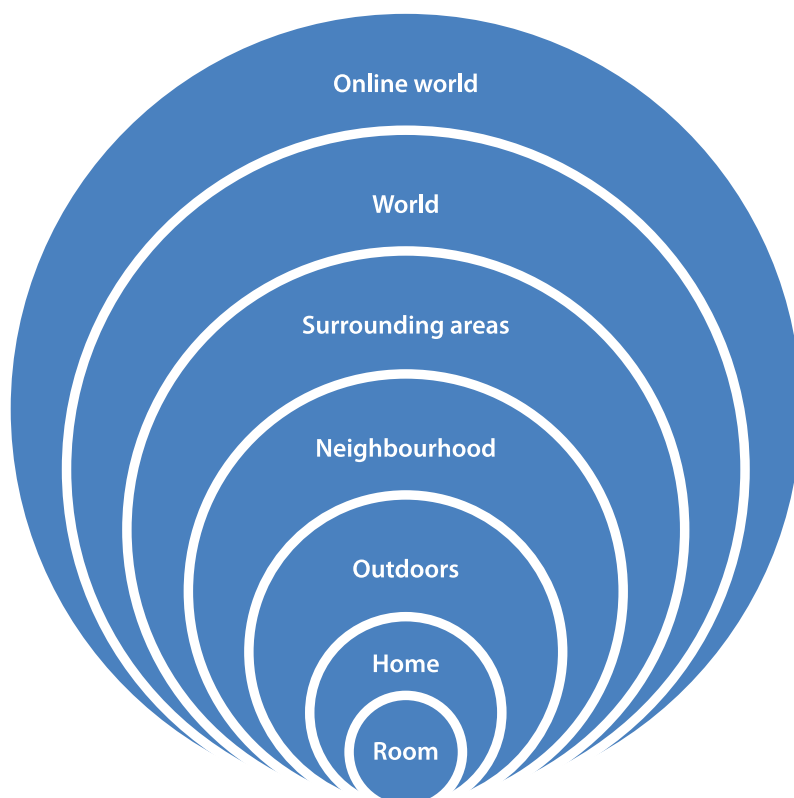
production of new results, the validation of existing research and the potential for the transferability and implementation of knowledge.

There is still a dearth of action and participatory research on place, exclusion and ageing, with an increase in the number of these studies only recently evident. Work in this area recognises and mobilises older people as active users of given places, members of the communities and neighbourhoods, and agents of past and future change. A wider use of these methodologies is likely to provide researchers and policy makers with an evidence base for policy formation that is more relevant to the lives experience of older residents (Buffel, 2018).

## What are the main policy and practice challenges?

As noted above, the heterogeneity of older adults and their places makes the process of developing transferable policy and practice, which can minimise the negative consequence of exclusion, particularly difficult. This in part is due to the different levels or scales of life-space that have to be accounted for in our understanding of older people's relationship with their environment. The model of seven (plus one) life space locations of older adult presented in Figure 2 can serve as an inventory of different levels of policies which are needed to address major challenges with respect to person-environment interactions.

**Figure 2: Adapted framework model of life-spaces locations**



*Source: Adapted by Vidovićová et al. (2013) from conical model presented in Webber, Porter & Menec, 2010: 446<sup>1</sup> and enhanced in the ROSEnet working group discussions by Irene Cieraad.*

The level of “**world**” serves as a reminder that the environmental issues of sustainable development and the related problems of climate change need global action, while their impact is very local and is differentiated by age. (Pope, Wu, & Boone, 2016; Pillemer et al., 2010) The **surrounding areas** and **neighbourhood** levels raise questions about supported mobility, travel and accessible transport (e.g. frequency, timing of connections and barrier-free vehicles; safety and the absence of crime; dense social networks). Policy

<sup>1</sup> Conical model of the theoretical framework for mobility in older adults is illustrating seven life-space locations (ascending in order of increasing distance from the room where one sleeps), each of which is composed of mobility determinants related to cognitive, psychosocial, physical, environmental, and financial factors. In the original model there is also a ring representing gender, culture, and biographical influences surrounds the entire cone exerting influence on all of the mobility determinants.



makers also face a challenge in fostering processes that enhance a sense of belonging to place through community-building policies (Buffel et al., 2014; Barrett & McGoldrick, 2013; Bowling & Stafford, 2007). The **outdoors** level encompasses the need for policies to address walkability, greenery, aesthetic, surveillance zones (e.g. respect for pleasant views from houses when revitalising or building new neighbourhoods); comfortable benches facing interesting views; and available toilets in known locations (Tournier, Dommes, & Cavallo, 2016). There are also policies which need to have a more direct effect on the **homes** of older people, combating housing related risks of exclusion in later age by addressing challenges in home maintenance, heating/cooling costs, affordability, and sustainability, etc. (Martin-Matthews & Cloutier 2017; Kneale, 2016; Holland & Katz, 2010) The **room** level indicates the importance of this environment in relation to addressing exclusion around care provision in the case of increased frailty, or where, for example, injuries and falls may be prevented. The overarching “**online world**” is a dimension to express the (not so) new impact of technologies and communication devices in altering our living spaces and how we use them. Although not physical in the original meaning of the term, it represents a place where both social relations are established and maintained and care provided (Blackman, Van Schaik & Martyr, 2007).

How to best translate available scientific knowledge into action that ensures the cooperation of different actors representing each of these dimensions, approaches and policy agendas, remains a fundamental gap in combating community and spatial social exclusion.

## To conclude

This Briefing Paper summarised the current knowledge and research gaps regarding community and spatial aspects of social exclusion in older age. The maintenance of mobility is a key target because it allows older adults to keep a satisfying life style, at home and within the community, and supports satisfactory participation in local life. However, staying mobile during aging is challenged by age-related changes (e.g., reduced networks, physical limitations affecting walking, neurodegenerative diseases, driving cessation) and it is essential to offer older adults supporting environments. Deficits in mobility, if not compensated by environmental support, will have a negative impact on the social inclusion of older adults. The progressive understanding of specific needs of older adults regarding mobility and community involvement led to the development of the concept of “age-friendly cities and communities”.

A quarter of European citizens will be over 60 years by 2020 (European Commission, 2014). However, life trajectories become more and more varied with aging, and the older adult population is characterised by a high degree of heterogeneity. Heterogeneous are also places and spatial contexts in which older people live, work, play, learn, care and are being cared for. The policies are powerful tools for addressing and elevating the multifaceted space and community based social exclusion(s), especially if co-designed with older people and other relevant stakeholders.

Regarding heterogeneity of older adults, this Brief paper reviewed variables regularly mentioned in the scientific literature as increasing the risk of exclusion, such as very old age (75-80 and more), a migration background, or a neurological disorder (e.g., Alzheimer’s disease). Others will have a differential impact on social exclusion, such as gender or socioeconomic class. The knowledge that some groups of older adults living in particular places and communities are more at risk of social exclusion allows the proper orientation of social policies and practices.

The main research gaps have been identified in this paper, especially the lack of multidisciplinary and qualitative investigations, the lack of research examining outcomes in the living environment in later life, or even the joint investigation of population aging and environmental concerns (e.g., what are the environmental consequences of older adults’ housing and living environments, and conversely, what are the environmental threats to the health and well-being of older adults?). More investigations are necessary also to grasp cultural differences, with a better representation of various cultural and linguistic backgrounds.

The heterogeneity of the older adult population challenges the development of transferable policy and practice, and we need more interaction between research and policy, in order to have more evidence-based actions. In this context, the seven-plus-one-zone model (i.e., room, home, outdoors, neighbourhoods, surrounding areas, world and online world) can help orienting both policy and actions implementation as well as their inventory.

## Key Messages

In analysing what we know about the causes and consequences of community and spatial aspects of exclusion amongst older people, there are six key messages that are necessary to note. These include:

**1.** Housing tends to age with its occupiers, particularly in the case of poorer older residents. Consideration is necessary to develop multifaceted housing policies that target the maintenance and redevelopment of existing housing stock and integrates appropriate financial support and renovation schemes, adequate local service infrastructure and principles of sustainability;

**2.** Ageing in place may not in all cases be an active choice: some older adults are “stuck in places”, without the possibility to live where they would like to live or have a voice over the changes in their surroundings. Policies on community care provision and ageing in place needs to consider the diverse circumstances, preference and needs of older residents in designing attempts to support older residential populations;

**3.** Available public transportation is often not adequately adapted to the needs of older adults and can impede their mobility. It is necessary to apply best practice principles in reassessing public transportation policies and developing new mobility strategies for older adults;

**4.** Public spaces (e.g. retail and shopping zones) and green places where older people can socialise and pursue leisure activities are limited in number in some environmental contexts. Greater consideration is necessary of the ways that such spaces and places can be used to support social inclusion and used to inform urban and rural development and regeneration strategies;

**5.** Environmental change and severe weather conditions represent major threats to vulnerable and frail older adults. Active consideration of older populations is necessary in the development of disaster preparedness plan, flood risk management strategies and longer-term environmental sustainability policies;

**6.** Examples of meaningful consultation with older residents in development and regeneration plans are few. Older adults need to be consulted regarding community and space related issues (e.g. urban planning) with a particular need for processes of empowerment and supported expression of voice embedded within these consultation processes.

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## ROSEnet CA15122 COST ACTION

*ROSEnet aims to overcome fragmentation and critical gaps in conceptual innovation on old-age exclusion across the life course, in order to address the research-policy disconnect and tackle social exclusion amongst older people in Europe.*

### Research Objectives

- Synthesise existing knowledge from regional, disciplinary and sectorally disparate dialogues, forming a coherent scientific discourse on old-age exclusion;
- Critically investigate the construction of life-course old-age exclusion across economic, social, service, civic rights, and community/spatial domains;
- Assess the implications of old-age exclusion across the life course within economic, social, service, civic rights, and community/spatial domains;
- Develop new conceptual and theoretical frameworks that can be practically applied in understanding and combating the exclusion of older people in European societies;
- Identify innovative, and implementable, policy and practice for reducing old-age exclusion amongst different groups of older people and in different jurisdictional and regional contexts.

For further information please visit:

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