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Social exclusion in later life: a systematic review of the literature

- ACCEPTED FOR PUBLICATION -

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Social Exclusion in Later Life: a Systematic Review of the Literature

Abstract

In the last decade, there has been a growing awareness regarding social exclusion. Considering the ageing population and the likelihood of older people being socially excluded, the aims of this article are to: (1) review existing studies concerning social exclusion in later life; and (2) identify how environmental and life-course perspectives are presented in studies focusing on social exclusion in later life. A systematic review in seven scientific databases was conducted to explore the peer-reviewed evidence. In total, 26 articles were included and analysed. Findings describe the variety of methods, conceptualisation, dimensions and measures used in this recent area of research. Determinants of social exclusion in later life are discussed and life-course and environmental perspectives are examined. The discussion highlights the complex character of the concept and measurement of social exclusion, and the presence of general and age-specific dimensions of social exclusion in later life. The time and context relativity and the need for life-course and environmental perspectives on social exclusion in later life are discussed. Finally, future directions of research are discussed.

Keywords: social exclusion, social inclusion, later life, systematic review

Introduction

Since the early work of Townsend (1979) on the detrimental effects of relative poverty and scarcity of multiple resources in the UK, the concept of social exclusion has gained prominence in social sciences, with several gerontological researchers stressing the usefulness of the concept of social exclusion to study the disadvantages faced in later life (Scharf and Keating 2012). This is of particular importance because, within the ageing population, the oldest are more at risk of social exclusion (Barnes et al. 2006; Kneale 2012) and the population is ageing (Eurostat 2012: 111-112), and because

evidence demonstrates that older people are prone to coexisting disadvantages (Heap et al. 2013). Older adults are more vulnerable to social exclusion due to age-related changes, such as greater risk of reduced mental health, illness, or physical limitations (Jokela et al. 2013; Kleiber and Nimrod 2009), loss of autonomy (Kneale 2012), loss of partner, family and friends (Rook 2009), or age-related discriminations and ageism (Allan et al. 2014). Besides these individual changes, global, economic and social developments such as digitalisation (Morris 2007) and changing marital and family building patterns (Gray et al. 2011) can affect the likelihood of older people's social exclusion.

Although the study of social exclusion in older people is important, it is mostly studied among an entire population (Vrooman and Hoff 2013), (migrant) younger (Thompson et al. 2014) or working adults (Bäckman and Nilsson 2011), and people with mental health problems (Coombs et al. 2013). However, recently, increased attention has been given to the theoretical and conceptual development of social exclusion concerning older adults (e.g. Jehoel-Gijsbers and Vrooman 2008; Ward et al. 2014). The present study aimed to contribute to this development by analysing how scientific articles address social exclusion in later life, in order to outline future pathways for research into late-life social exclusion. More specifically, this article aims to identify how social exclusion in later life is operationalised and measured; which determinants are related to old age exclusion; and how the life-course and environmental perspective is taken into account. To achieve these goals, a systematic search was conducted in seven databases, and 26 English-language empirical articles that significantly focused on social exclusion or inclusion of older adults were selected and reviewed. The review starts with the background to the concept of social exclusion and a description of the relevance of applying an environmental and life-course perspective to studying social exclusion in later life. The methods section describes the procedure of the systematic review and the results report the evidence found. The article closes with a discussion of the results, together with limitations of the study and directions for future research.

Background

Although the concept of social exclusion was already adopted by politicians, journalists and activists during the 1960s in France when referring to poor people as those who are excluded (Silver 1994), it is Renée Lenoir (1974) who is considered as the founder of this concept (Frétigné 1999). In his publication, *Les exclus: Un français sur dix*, Lenoir (1974) used the term exclusion for people who were not protected by social insurance. While he mainly focused on people with mental illness, drug addiction, delinquency and disabled people as being socially excluded, the concept further evolved in French policy with an emphasis on (un)employment. Besides France, other countries also developed a growing interest in social exclusion as a policy concept. For instance, in 1997, the Social Exclusion Unit was established by Tony Blair, Prime Minister of the UK. This unit provided advice and scientific evidence for the government's goal of reducing social exclusion (Burchardt et al. 2009). To date, the concept of social exclusion still inspires European policy. For instance, fighting poverty and reducing the number of people at risk of social exclusion is one of the main targets of Europe's 2020 strategy (European Commission 2014). Furthermore, 2010 was the European Year for Combating Poverty and Social Exclusion (European Commission 2008).

Although widely used in both policy and research, the concept of social exclusion still has no clear, agreed upon definition (Levitas et al. 2007). For instance, social exclusion has a close relation to other concepts such as social isolation (Curran et al. 2007), which was considered as a key factor in the early development of the concept (Evans 1998 in Burchardt et al. 1999). Social isolation however, only operationalises the lack of social resources embedded in social contacts and relations and can therefore be seen as one of the fields of disadvantage of social exclusion (Burchardt et al. 1999).

To gain insight into the concept of social exclusion in later life, it is of interest to study it from two theoretical perspectives, which have a prominent place in studying ageing and late life in (social) gerontology. First, ageing occurs from birth to death (Passuth and Bengston 1996 in Phillipson 2013),

and one's life course is built through choices and actions of an individual within the constraints of historical and social context (Elder et al. 2003 in Bäckman and Nilsson 2011). Consequently, in studying old-age inequalities and social exclusion, the life course should also be taken into account. The cumulative advantage disadvantage theory points to the complex accumulation of conditions of (dis)advantage. Negative conditions increase the chance of future negative conditions and positive conditions increase the chance of future positive conditions. This leads to inequalities being more pronounced in later compared to earlier life (Dannefer 2003). Life course has become less standardised due to societal developments in the labour market (e.g. increased flexibility) and extensive diversification in family organisation (e.g. increased divorce rates) (Beck 1986). These developments have led to unequal distribution of resources to events and transitions in life course, resulting in movement in and out of poverty and social exclusion. In other words, studying social exclusion in later life enables researchers to uncover both dynamics in and out of social exclusion.

The environmental perspective is also an important perspective in studying social aspects of ageing. It gives considerable attention to the influence of the (immediate) environment on conditions in later life (Wahl and Oswald 2010). As older people aspire and therefore tend to age in place (Wagner et al. 2010), the living environment becomes more important in daily life and participatory activities (Buffel et al. 2012; Dury et al. 2014). There is strong evidence of the relation between the living environment and feelings of safety (De Donder et al. 2013), wellbeing (Tomaszewski 2013) and social participation of older people (Dury et al. 2014; Tomaszewski 2013). Some studies have demonstrated the influence of socioeconomic neighbourhood factors on physical frailty in later life (Myers et al. 2014). Other studies have revealed the environmental effects on income (Miltenburg 2015) and labour market performance (van Ham and Manley 2010). In other words, the living environment might influence conditions of exclusion and inclusion in later life; however, little is known on how neighbourhood factors influence older resident's risk of exclusion. For this reason,

the question remains how the living environment may promote or hinder social exclusion in later life.

Research goal

This study posed five questions: (1) How is social exclusion in older adults studied? (2) How is social exclusion in older adults conceptualised and measured, and which dimensions are used? (3) What are the different determinants related to social exclusion in later life? (4) Does the literature take into account the life-course perspective? (5) Does the literature take into account the importance of the environment?

Methods

Rationale

We opted for a systematic review because it enables researchers to evaluate and interpret all available evidence relevant to a particular question (Glasziou et al. 2001). This method allows us to pinpoint research gaps (Petticrew and Robberts 2006). The main difference with a traditional literature review is that previous work is systematically identified (Glasziou et al. 2001) and that steps in the review process are made explicit to facilitate reproducibility (Petticrew and Robberts 2006).

Search Strategy: Information Sources and Search String

Relevant articles were identified by searching article titles in seven databases: ISI Web of Knowledge, Sociological Abstracts, EconLit, ERIC, PILOTS, Social Services Abstracts, and PubMed. Using the following search string we performed a search by title: (Social* exclu* OR social* inclu*) AND (Eld* OR old* OR ag*ng OR lat* life OR retir* OR pension*). Due to the difference in entry method for PubMed, we approached the above search using the following search strings: (1) ("Aged"[Mesh]) AND "Social Marginalization"[Mesh] and (2) "Aged"[Mesh] AND ("social inclusion"[Title] OR

"social exclusion"[Title]). The searches were done in July 2015. The electronic search resulted, after omitting duplicates, in 91 unique articles. Figure 1 gives an overview of the selection process.

< Insert Figure 1 around here >

Fig. 1 Search strategy

Although there is a large amount of grey literature (e.g. policy documents and reports) addressing inclusion or exclusion among older adults, this review only includes articles from academic journals. This decision was taken because we aimed to have an overview of the current scientific knowledge specifically focusing on social exclusion or inclusion in later life. We therefore limited our search terms to the concepts social exclusion and inclusion. Our search started with the finding that the concept of social exclusion is increasingly used in research and policymaking. Therefore, the main aim was to explore what is known about social exclusion in later life; for example, how is social exclusion conceptualised in later life, and measured? We did not include other studies that touch upon the social exclusion theme, but do not label it as social exclusion, as these studies would not give us answers to these questions. We acknowledge the limitations that stem from these decisions, namely, that information relating to social exclusion or inclusion in later life may therefore be lacking (Petticrew and Roberts 2006).

Study Selection and Eligibility Criteria

Applying inclusion criteria reduced the electronic search sample from 91 to 23 articles. No restriction was placed on publication year. We only considered articles (1) published in academic journals; (2) fully available in English language; (3) that mainly centred on social exclusion or inclusion; and (4) among home-dwelling older adults. For instance, studies that did not aim to examine social exclusion but afterwards labelled their findings as social exclusion were not taken into account (e.g. Hossen and Westhues 2010). This study relied on the papers' operationalisation of an older adult or old age. In other words, there was no age limitation for the inclusion of papers focussing on older adults. If

studies, besides older adults, also studied social exclusion or inclusion among other age groups, they were also considered. The inclusion criteria were applied by screening the articles based on their title, abstract or full text. This electronic search was complemented with a manual search with the same inclusion criteria, resulting in three extra articles.

Quality Appraisal

Criteria for judging the quality of the papers were derived from the following tools: Petticrew and Roberts (2006) for appraising observational studies and surveys; the National Institute for Health and Clinical Excellence (2009) for qualitative papers; Pluye et al. (2011) for mixed method papers; the Newcastle–Ottawa quality assessment scale (n.d.) for cohort studies; and Morgenstern (2008) for ecological studies. Based on the appraisals, we observed a wide variety in methodological quality among the different articles. The main point of discussion in assessing the quality of all types of papers was the lack of information given by the authors. Quality appraisal was sometimes impeded by this lack of transparency. For instance, information on ethics, (theoretical) rationale for chosen research approach and limitations was often missing. In quantitative studies, there was variation in (non)-reporting response rate, rationale for applied data analysis, and potential biases in data collection. In quantitative secondary data analysis, online information was present with details on data collection methods, and in some cases, entire quality assessments were available. This was less common with first-time surveys. In some studies (e.g. Cheung and Leung 2013), a detailed rationale was given for the use of the applied techniques and detailed information was available on potential biases of the study, such as acquiescence bias. In only a few studies was attention given to additional sampling to include mostly under-represented participants, such as ethnic minorities. Qualitative studies generally scored well on the description of the context of the research and the research participants. Conversely, only a few qualitative studies specified the role of the researcher and ethical considerations or approval. Ultimately, no study was omitted from this review based on its

methodological quality. In total, 26 papers were included in this review. These articles are marked with an asterisk in the reference list.

Data Extraction

We extracted the following details from the included articles: authors, year of publication, researched countries and areas, main objectives, theoretical framework, respondents, age, sample size, research methodology, and conceptualisation, measurement and determinants of social exclusion or inclusion.

Synthesis of Results

A meta-analysis was considered inappropriate because of the wide variety in objectives, methods, design and statistical techniques in the included studies. Therefore, a narrative synthesis, that is, summarising and explaining results in words, was considered most convenient for reviewing the included articles (Mays et al. 2005).

Results

How Is Social Exclusion in Older Adults Studied?

Country

The Appendix gives an overview of the empirical studies discussed in this review. Most articles (11/26) studied social exclusion and older adults in European Anglo Saxon countries (UK and Ireland). Five articles focused on other European countries, and three of these studies centred on Central and/or Eastern Europe. The remaining 10 articles originated from outside Europe, namely China (3/10), US (2/10), Australia (2/10), Japan (1/10), Canada (1/10), and Ghana and Senegal (1/10).

Period

Although the concepts of social exclusion and social inclusion emerged in the second half of the 20th century (Silver 1994), studying them among older adults appears to be more recent. The first articles

dated from the beginning of the millennium, but most articles (18/26) were published in 2010 and later. European Anglo Saxon countries seem to have a longer scientific tradition in studying these concepts in later life, as the first articles in these countries dated from 2001 in contrast to 2005 in Europe, 2008 in Australia, 2011 in Asian countries, and 2013 in the US.

Methods

Of the 26 articles examined in this study, 11 applied quantitative methods, nine used qualitative methods, five included a mixed method approach, and one opted for a risk biography. Eight of the quantitative and mixed method studies used secondary data. Data for these secondary data analyses were derived from European-wide surveys (European Quality of Life Survey, European Social Survey, EU-SILC, Eurostat), national surveys, or the WHO European Mortality database. In seven quantitative studies, surveys were used for data collection. One study used an observational method (Löckenhoff et al. 2013). Studies using a quantitative approach focused on detecting determinants of social exclusion (10/16) or examining the influence or effect of social exclusion (5/16). One quantitative study focused on the experience of living in socially excluded or disadvantaged neighbourhoods. Some limitations or weaknesses might be detected in the various quantitative studies. First, sample selection is often not representative. Löckenhoff et al. (2013), for instance, recruited people from the local community near the university, which might have been biased towards people with higher education. Second, although the use of secondary data has its advantages, such as saving time, some disadvantages can be noted, such as lack of control over data quality (Saunders et al. 2009), and inappropriateness of data because they have been collected to answer different research questions (Denscombe 2007). Qualitative or mixed method studies mainly opted for interviews (9 studies) or focus groups (4 studies). Two studies chose observations; one for participant workshops and one for document analysis. Seven studies examined determinants of social exclusion in later life (such as public housing; Morris 2008). One study explored older adult's perception of the meaning and operationalisation of social exclusion; one examined the experience of living in socially excluded

or deprived neighbourhoods; one focused on the coping behaviour of older adults in situations of exclusion; and three investigated the experience of social exclusion and poverty in older adults. Likewise, one of the main biases in the qualitative research included in this review was that there was too much focus on stakeholders, such as volunteers and professionals in health and social services, but too little on the perceptions of older adults.

Respondents

Although all articles focused on social exclusion or inclusion among older people, some articles did not have solely older adults as respondents. Five articles focused on key informants or stakeholders (such as home care workers and community workers). Six articles also included younger age groups. The age range of older people differed greatly; articles operationalised them as 70+ (2/26), 65+ (8/26), 60+ (9/26), 55+ (1/26) and 50+ (1/26) years.

Scope of the Study: Social Exclusion and Inclusion

Eighteen articles focused on social exclusion; five on social inclusion; and three on both. In general, the review presented a wide variety in research aims and content. Most articles examined determinants of social exclusion (17/26). Nine articles dealt with the experience of social exclusion or inclusion. Seven articles reported prevalence or frequency of social exclusion and inclusion and/or its dimensions. Five articles explored the effect of social exclusion on enrolment in social health protection schemes, mortality rates, depression or poverty.

Research Area

In eight articles, the research area was the national level of one or more countries such as Ireland, Slovenia, Serbia and US. In five of these articles, comparisons were made between different European countries. Seventeen articles focused on a more regional level and one on a specific setting, namely an arts programme in a senior centre in Canada (Moody and Phinney 2012). Of the 17 regional

analyses, six were studies specifically in rural areas, and seven were specifically concerned with more urban areas.

Theoretical Framework

Most studies referred to previous general social exclusion or inclusion literature and findings, with five studies specifically making reference to this literature in relation to old age. In three articles, research questions or hypotheses were explicitly built on a theory or framework. Cheung and Leung (2013) applied the resource, self-interest and exchange theories to formulate their hypotheses. Whelan and Maître (2008) use life-course and life-cycle theories as a starting point for their research. Finally, Löckenhoff et al. (2013) tested different theoretical perspectives for the explanation of age differences in response to progressive social exclusion such as socio-emotional selectivity theory. Five articles referred to gerontological theories or themes in their introductory part (Milbourne and Doheny 2012; Moody and Phinney 2012; O’Shea et al. 2012; Scharf et al. 2005; Walsh et al. 2014).

How Is Social Exclusion In Older Adults Conceptualised and Measured?

Seventeen of the 26 studies clearly described how they considered social exclusion in later life. Although there is a consensus among researchers that social exclusion or inclusion is a multidimensional concept (e.g. Room 1999; Scutella and Wilkins 2010), four of 17 articles still conceptualised it as one-dimensional. For instance, Guardiancich (2010) focused solely on the income generated by entitlements and did not include other dimensions of social exclusion or inclusion. Also Cheung and Leung (2013) and Yur’yev et al. (2010) only operationalised ageism in their research, while not including other dimensions for measuring social inclusion.

< Insert Table 1 around here >

Table 1 presents an overview of the different dimensions that were used to describe or measure social exclusion or inclusion. Participation in civic activities (10/17), exclusion from basic services or information (9/17), social relations (9/17), income or financial resources (7/17), material resources (7/17), neighbourhood exclusion (6/17), and housing (6/17) were frequently used. To a lesser extent health (4/17), access to health services (3/17), ageism (3/17), self-dependence (1/17), transport (1/17), psychological wellbeing (1/17) and ostracism (1/17) were mentioned as dimensions of social exclusion or inclusion. One study included a dimension related to participation in the labour market (e.g. employment status; Lee et al. 2014).

Even though most “dimension titles” recurred, not all dimensions were operationalised using the same indicators. For example, Hrast et al. (2012) measured the dimension social relations by asking if the respondent had no person to turn to in at least one of a set of circumstances. Tong et al. (2011) measured the same dimension by asking if the respondent had contact by telephone, met someone during the past week, or had someone to trust and rely on for help, and feelings of loneliness. The operationalisation of dimensions by Lee et al. (2014) differed most strongly from that in other articles. For instance, whereas most articles assessed the participation of older adults in civic activities to analyse the participation dimension, Lee et al. (2014) evaluated the ability of respondents to speak English, their citizenship status, and duration of residency in the US. Participation in civic activities uses a wide range of activities, such as political participation (e.g. voting, being in a decision-making position, and watching a programme about current affairs) (Ogg 2005; Parmar et al. 2014), attending religious events or meetings (Parmar et al. 2014), attending meetings of or being a member of an association or community group (Scharf et al. 2005), having a hobby (Saito et al. 2012), or being a volunteer (Tong et al. 2011).

Reviewing the measurement of social exclusion or inclusion, no article was found applying a validated measure. Only Scharf et al. (2005) and Saito et al. (2012) used validated scales to construct

respectively some sub-dimensions of social exclusion: for example, the De Jong Gierveld 11 items loneliness scale (De Jong Gierveld and Kamphuis 1985 in Scharf et al. 2005), the index of multiple deprivation (Evandrou 2000 in Scharf et al. 2005) or the Organisation for Economic Co-operation and Development definition of relative poverty (Förster 1994 in Saito et al. 2012). Four articles constructed a total social exclusion scale or measure. One article used a specific statistical procedure, namely the Schwarz's Bayesian criterion to build a social exclusion index (Ogg 2005). One article counted the dimensions "excluded on" as a total social exclusion measure (Scharf et al. 2005). The two remaining articles grouped dimensions in different categories to become a social exclusion index (Saito et al. 2012; Whelan and Maître 2008). Only one article applied a subjective, self-reported social exclusion measure (Shergold and Parkhurst 2012)

What Are the Different Determinants Related to Social Exclusion in Later Life?

Seventeen articles studied determinants that may enhance or inhibit social exclusion or inclusion or one of its dimensions. Table 2 gives an overview of the different determinants, grouped into individual, environmental and macro factors and indicates which determinants were examined and if possible, whether they were statistically significant.

< Insert Table 2 around here >

Data Analysis Method

Of the eight studies that quantitatively studied determinants of social exclusion, three used descriptive analyses (Hrast et al. 2012,2013; Milbourne and Doheny 2012); three used a bivariate analysis procedure (Hrast et al. 2012; Scharf et al. 2005; Shergold and Parkhurst 2012); and three used regression analyses (Cheung and Leung 2013; Ogg 2005; Whelan and Maître 2008).

Individual Determinants

Eleven articles studied individual determinants. Age was the most studied determinant (8/11), followed by gender (4/11), household composition (4/11), marital status (3/11), and education (3/11). Other individual determinants (e.g. ethnicity, social class and quality of life) were studied only once or twice. The varying operationalisation of social exclusion or its dimensions and the variability in significance of determinants, impeded the generalisation of the effects of the determinant. Some articles indicated a positive significant effect of age on some of the dimensions of social exclusion, such as more ageism (Cheung and Leung 2013), increased exclusion from material resources, interpersonal relations, services (Hrast et al. 2012), and poorer health (Hrast et al. 2012; Whelan and Maître 2008). In contrast, younger adults were more excluded from housing (Hrast et al. 2012).

Environmental Determinants

Twelve articles examined environmental determinants. Degree or features of rurality or urbanity (5/12) and the availability and accessibility to services (4/12) were most frequently studied. A significant positive effect of urbanity was found if urbanity was included as an explanatory variable in logistic regression (Ogg 2005). In contrast, Shergold and Parkhurst (2012) demonstrated that people living in the most rural areas were significantly more prone to be excluded from different services such as a public housing, post offices and dentists compared to those living in less remote rural areas. Other studied environmental determinants were access to transport (3/12), housing conditions (3/12), informal support (2/11), social cohesion (2/12) and natural meeting points (1/12). Housing conditions, access to transport and social cohesion were significant determinants of social exclusion in at least one article. For instance, when an older person did not experience housing problems, the older person was less likely to be excluded from material resources, social relations, basic services and the neighbourhood (Scharf et al. 2005). Qualitative research shows, however, that housing tenure associated with less-favourable housing and neighbourhood conditions does not have to lead to experiences of social exclusion (Morris 2008). Furthermore, Cheung and Leung (2013) found that social cohesion had a positive significant effect on social inclusion.

Macro Determinants

Seven articles examined macro factors as determinants of social exclusion. Four of these articles compared country or welfare types. Ogg (2005) identified a significant effect of country type on the likelihood of being socially excluded. Older adults residing in Eastern or Southern European countries were more likely to be social excluded compared to residents aged ≥ 60 years in Nordic European countries. Three studies considered economic circumstances as a macro determinant affecting the likelihood of being excluded. For example, Cheung and Leung (2013) found a significant influence of the financial crisis on ageism-related dimensions of social exclusion. Furthermore, they demonstrated the relation between receiving government policy benefits and ageism-related dimensions of social exclusion. Finally, Walsh et al. (2014) concluded that urban and international out-migration was a possible threat to the social inclusion of rural older adults.

Does the Literature Take into Account the Life Course?

The life-course perspective is little applied in studies addressing social exclusion or inclusion in later life. The most explicit focus was found by Whelan and Maître (2008) who examined if life-course variables (e.g. age, household composition and marital status) lead to more social exclusion compared to social class (middle class, self-employed and working class).

Does the Literature Take into Account the Importance of the Environment?

No study started from hypotheses based on environmental (gerontological) theories. Some studies refer in their literature to accessibility and mobility (Shergold and Parkhurst 2012), geography of exclusion (Abbott and Sapsford 2005), spatial exclusion, influence of rurality on risk of social exclusion or poverty (Dwyer and Hardill 2011; Milbourne and Doheny 2012), ageing in place (Moody and Phinney 2012; O'Shea et al. 2012; Scharf et al. 2005), or attachment to place (Milbourne and Doheny 2012; O'Shea et al. 2012). From this, we assume that authors acknowledge that place

and environment matter for older people and should consequently have a key role in studying social exclusion.

In the operationalisation of social exclusion in later life, different dimensions are related to the environment of older adults. Housing conditions are related to the close environment of the older resident, while access to (health) services and neighbourhood exclusion is more related to the wider environment. Scharf et al. (2005) paid attention to both services in and outside the home in their operationalisation of access to services. On the level of determinants of social exclusion, attention is also given to the influence of the environment. This can range from macro-environmental determinants such as welfare type, to more immediate environmental determinants such as level of urbanity or rurality, or even more immediate, such as housing conditions. Only in the quantitative studies examining the influence of level of rurality or urbanity were objective neighbourhood features applied. No studies conducted multilevel analyses to investigate the role of objective environmental features.

Discussion

In the light of the ageing population, their vulnerability to social exclusion (Barnes et al. 2006; Kneale 2012) and the growing literature on social exclusion in later life (e.g. Jehoel-Gijsbers and Vrooman 2008; Ward et al. 2014), we conducted a systematic review to generate an overview of the scientific evidence that addresses social exclusion and inclusion in later life. Based on this review, we conclude that studying social exclusion in later life is a recent research area, with the first articles dated from 2001 and mostly focusing on social exclusion instead of inclusion. Next, there is a high focus within European Anglo Saxon countries on this topic, which could conceivably be explained by the level of related policy in, for example the UK, which is illustrated by the setting up of a Social Exclusion Unit by the Labour Government in 1997 (Burchardt et al. 2009). Although, the inclusion criterion of

English-language articles could also explain the high rate of European Anglo Saxon countries in our review, this is however not reflected in literature from the US. The small proportion of articles in the US could be explained by the fact that they focus more on absolute poverty (Moffatt and Glasgow 2009).

Different key ideas of social exclusion in later life emerge from this review. In general, this review confirms the complex character of the concept of social exclusion that has been put forward in earlier studies. In line with previous research (Levitas et al. 2007; Silver 1994), our systematic review confirms that social exclusion is a concept with little general agreement about the definition or operationalisation. Clarification of the concept of social exclusion arises most often by looking at the dimensions under study. Conversely, the distinction between dimensions and determinants is often blurred. For instance, while four articles deemed health as a dimension of social exclusion (Hrast et al. 2012, 2013; Ogg 2005; Whelan and Maître 2008), two other articles acknowledged it as a determinant (Dwyer and Hardill 2011; Scharf et al. 2005). Also financial resources, experience of crime, participation in civic activities, housing and access to transport and services are considered both as a dimension and a determinant. Scharf et al. (2005) revealed inter-relatedness between their studied dimensions, indicating that dimensions can be determinants of each other.

Besides this, age-particular social exclusion dimensions for older people emerged. For example, dimensions related to perceptions about and behaviour towards older adults (Cheung and Leung 2013; Parmar et al. 2014; Yur'yev et al. 2010) are often used. Ageism can therefore be considered as an old-age-specific social exclusion dimension. Although this review revealed different potential dimensions for exclusion in later life, some dimensions seem to be lacking. For example, digital exclusion is not used as a dimension of social exclusion in later life (Helsper 2012), despite its potential positive outcomes and ability to compensate for exclusion in other dimensions such as social relations (Nimrod 2014; Ofei-Dodoo et al. 2015) or access to services (Larsson et al. 2013).

The difficulties in the operationalisation of social exclusion are closely related to the relative character of the concept. For example, the use of labour market participation as a dimension of social exclusion illustrates the time and context relativity of the concept. We could argue that most older people are retired, and consequently labour market participation is less relevant for them, however, this is not directly shown in European figures. First, the employment rate for older adults at age 65–69 years varies considerably within European countries: ranging from 3.8% in Slovakia and 4.7% in Belgium to 47.9% in Iceland. Second, the proportion of people who continue working while receiving an old age pension (50–69 years) also illustrates that employment or working is important for some older adults in some countries. For instance in Norway, Iceland and Sweden, about four out of 10 persons receiving an old-age pension continues working. Conversely, this proportion does not reach 5% in Estonia and Greece. Besides this heterogeneity between countries, there is also variation in why people continue working while receiving an old-age pension. In Romania and Greece, $\geq 90\%$ of those still working while receiving an old-age pension do this to provide sufficient personal or household income, whereas in Norway and Denmark, this is $< 10\%$. In these countries, $> 80\%$ choose to continue working while receiving old-age pensions for non-financial reasons such as work satisfaction (Eurostat 2015). These varying figures imply and stress the fluid character of the different markers of social exclusion. If for instance, pensioners work in order to maintain their household income, this is more related to social exclusion compared to pensioners who work for satisfaction. This shows how relative and context dependent the operationalisation of social exclusion is. We even enlarge this viewpoint by emphasising that operationalisation of social exclusion is also relative to life-cycle stage, because life-cycle-specific indicators of social exclusion exists (e.g. ageism), while the importance of some dimensions of exclusion might fluctuate depending on a person's life stage (Scutella et al. 2009). This leads to the conclusion that measures of social exclusion should vary across age groups.

Besides the key themes related to the operationalisation of social exclusion in later life, another key theme emerges, namely, the importance of studying social exclusion in later life from an environmental and life-course perspective. First, due to older peoples' aspiration to age in place (Wagner et al. 2010) and the decrease in older adults' action-radius, the living environment becomes more important in daily life and participation (Buffel et al. 2012; Dury et al. 2014). It has been shown how the environment influences older adults' feelings of safety (De Donder et al. 2013), wellbeing (Tomaszewski 2013) and social participation (Dury et al. 2014; Tomaszewski 2013). This review reveals that, in studying determinants of social exclusion in later life, almost equal attention goes to environmental and individual determinants of social exclusion; both more than macro determinants. However, few studies used a quantitative method to examine determinants, which impedes the generalisability of the influence of determinants. Concerning environmental determinants, little attention is given to objective area features. Most determinants are subjective variables about respondents' perception or assessment of neighbourhood or housing conditions. Explanation of the lack of life-course perspective, and of the study of neighbourhood effects of objective environmental features, may lay in the fact that longitudinal and environmental analyses have high data requirements. Second, given the fact that ageing is a process occurring from birth to death (Passuth and Bengston 1996 in Phillipson 2013), attention should not only be given to the current conditions influencing an older adult's likelihood of being socially excluded. In general, the articles pay scarce attention to the life course in studying social exclusion or inclusion in later life, and none report longitudinal studies or include life events as determinants of social exclusion. The only study that explicitly included a life-course perspective compared different age groups and their marital status to determine the influence of the life course. Unfortunately only working age adults were divided by marital status to specify life course features. Older adults were considered as one homogeneous group. This however does not acknowledge the heterogeneity of older people (Duncan and Smith 1989 in O'Rand 1996).

Further research

Based on this review, several research recommendations can be noted. First, future research could build its questions or hypotheses more upon theories in general or gerontological theories specifically. Currently, building upon theory is scarce, as shown by this review. This theoretical deficiency is at odds with the rising use of theory in social gerontology (Alley et al. 2010). Social exclusion in later life could be linked to the theory of stratification of and over the life course that specifies that resources are unequally distributed across age cohorts, leading to differences in resources among and within age cohorts (O’Rand 1990, 1996). In relation to the life-course relativity of social exclusion, as described in the discussion of this study, it is valuable to pay attention to the psychometric development of an old-age-specific social exclusion measure. Both the fluidity and the unclear definition of social exclusion might question the usefulness of an overarching social exclusion scale or measure, and plea for focusing on more defined conditions, such as poverty or social isolation. Although this would give more detailed information, it would also downplay the inter-relatedness of the domains of disadvantages (Halleröd 2009; Heap et al. 2013; Jehoel-Gijsbers 2004; Scharf et al. 2005). Research results indicate that about 20% (Barnes et al. 2006) to 36% (Scharf et al. 2005) of older people are excluded from more than one dimension, which emphasises the overlapping nature of different dimensions of social exclusion. Conversely, this is an argument to increase research attention for examining social exclusion in a multidimensional way, rather than focusing on one-dimensional conditions. In studying social exclusion in a multidimensional way, a simple metric (yes/no) or the current metrics only counting the number of dimensions excluded, do not deepen academic insight into the inter-related nature of the different domains of disadvantages of social exclusion. Therefore, we suggest that further research should investigate this by using adequate tools to deepen this insight. Most studies focus on age as an individual determinant, and few examine gender, ethnicity and education as determinants of social exclusion. These determinants are however, regularly studied determinants of social exclusion or disadvantages in other studies (Bäckman and Nilsson 2011; Heap et al. 2013; Vrooman and Hoff 2013). Future research of social exclusion in later

life might therefore examine these determinants. The effect of life events and life course is too little studied compared to other factors (Thomas 2011; Van Groenou and Van Tilburg 2003; Wahrendorf et al. 2015). In addition, although considerable attention is given to environmental aspects in some studies in this review, most of the studied macro or environmental factors are respondent-reported facts. Future research however could incorporate objective macro or environmental characteristics. More research could be conducted at the multidimensional level to examine separately the effect of individual and objective area level characteristics (Snijders and Bosker 2012). In this way, a more detailed view of the dynamics of social inclusion or exclusion can be derived.

Limitations

Although this review gives an overview of the existing and lacking evidence in the field of social exclusion and later life, there were some limitations. First, as we aimed to gain insight in the concept and research of social exclusion in particular, the search terms had to include social exclusion or inclusion. Nevertheless research on deprivation, disadvantages and social inequality could generate additional interesting information on similar topics (Curran et al. 2007). Second, omitting grey literature increased the risk of missing valuable results. As social exclusion is a policy concept, there also exists an extended literature consisting of, for example, policy reports. This kind of literature was not included in our review. Finally, due to our inclusion criteria, we could also have missed valuable non-English-language publications and we cannot make any conclusions regarding the social exclusion of non home-dwelling older adults. Despite these limitations, the overview provided in this article is useful for future research as it describes pathways for studying social exclusion in later life.

Conclusion

This systematic review contributes to the gap in theoretical and conceptual development concerning social exclusion in later life. It reveals a wide variety in content and methods addressed in social

exclusion or inclusion in later-life research; however, none of the articles focused on the measurement of social exclusion in later life. The lack of a validated social exclusion measure and use of different conceptualisations impedes the comparability and generalisability of our findings. Furthermore, the review demonstrates that most dimensions used to examine social exclusion in later life are similar to general social exclusion research, with the exception of ageism and labour-related dimensions. The most frequent dimensions are: participation in civic activities, exclusion from basic services, and social relations. Conceptualisation of social exclusion is not straightforward, as the distinction between determinants and dimensions is not clear. For example, health is in some studies a determinant and in others a dimension of social exclusion. Conceptualisation of social exclusion is, similar to general social exclusion research, complicated by the fluid or relative character of the concept of social exclusion. According to this review, not only place and culture relativity has to be taken into account, but also life-cycle relativity when studying social exclusion in later life. The relativity of the concepts raises questions concerning the need of an old-age exclusion measure. Although valuable research and practical data might be gathered from focusing on defined conditions of social exclusion (e.g. poverty or social isolation), this study argues for an old-age exclusion measure that demonstrates how dimensions of exclusion co-occur. Studying life-course influences is a valuable future pathway to gain more insight in the protective factors and determinants of social exclusion in later life. Also, identifying neighbourhood effects, operationalised by objective neighbourhood features, on social exclusion in later life could receive more research attention. Finally, researching social exclusion in later life is of importance due to the ageing population and its vulnerability to being socially excluded, but even more because social exclusion can have negative effects such as higher rates of depressive symptoms (Tong et al. 2011) and being more prone to suicide (Yur'yev et al. 2010).

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Table 1. Dimensions of social exclusion in later life

	Dimensions																
	Financial resources	Material resources	Social relations/ social isolation	Participation in civic activities	Health	Psychological wellbeing	Access to health services	Exclusion from basic services or information	Neighbourhood exclusion	Ageism	Transport	Housing	Employment labour market	Self-reported social exclusion	Self-dependence	Ostracism	Total
Cheung & Leung (2013)										X							1
Guardiancich (2010)	X																1
Hrast et al. (2012)		X	X		X		X	X				X					6
Hrast et al. (2013)		X	X		X		X	X				X					6
Lee et al. (2014)		X		X									X				3
Milbourne & Doheny (2012)	X		X	X				X	X								5
Parmar et al. (2014)	X	X	X	X			X	X	X	X		X			X		10
Löckenhoff et al. (2013)																X	1
Ogg (2005)	X		X	X	X	X			X								6
Saito et al. (2012)	X		X	X													3
Scharf et al. (2001)				X				X	X								3
Scharf et al. (2005)		X	X	X				X	X								5
Shergold & Parkhurst (2012)				X				X			X			X			4
Tong et al. (2011)	X		X	X				X				X					5
Whelan & Maitre (2008)	X	X			X				X			X					5
Yuan & Ngai (2012)		X	X	X				X				X					5
Yur'yev et al. (2010)										X							1
Total	7	7	9	10	4	1	3	9	6	3	1	6	1	1	1	1	

Note: X The study included information about this topic

Table 2. Determinants of social exclusion in later life

	Individual level															Environmental level						Macro level							
	Age	Gender	Social class	Marital status	Household composition	Parenthood	Educational level	Income	Employment status	Ethnicity	Owner occupation	Length of residence in neighbourhood	Health conditions	Quality of life	Crime experience	Access to internet	Civic participation	Other dimensions of SE	Housing conditions	Rurality/Urbanity/Region	Access to transport	Availability and accessibility services	Natural meeting points	Informal support	Social cohesion	Government benefit	Welfare/country type	Economic circumstances	Out-migration
Cheung & Leung (2013)	*	*		*			*	*	*			*													*	*		*	
Dwyer & Hardill (2011)													X						X	X	X								
Guardiancich (2010)																											X		
Hrast et al. (2012)	*																										X		
Hrast et al. (2013)	X																										X		
Milbourne & Doheny (2012)	X	X			X			X		X								X		X									
Moffatt & Scambler (2008)																					X								
Moody & Phinney (2012)																X													
Morris (2008)																		X											
Ogg (2005)	*	*		*	*	*	*												*							*			
O'Shea et al. (2012)																			X		X	X		X			X		
Scharf et al. (2005)	*	*		*			*			*	*	°	*	*	*		*		*	X		X	X		X			X	
Shergold & Parkhurst (2012)	*															*			*										
Walsh et al. (2014)																					X		X				X	X	
Whelan & Maître (2008)	*		*		*																	X					X		
Winterton et al. (2013)																				X									
Yuan & Ngai (2012)					X																		X						
Total	8	4	1	3	4	1	3	1	2	1	2	2	2	1	1	1	1	2	3	5	3	4	1	2	2	1	4	3	1

Note: X The study qualitatively or descriptively examined this determinant
 * The study found a significant association of this risk factor with social exclusion or one of its dimensions
 ° The study found no significant association of this risk factor with social exclusion or one of its dimensions

Appendix

Authors	Year	Researched countries		Context	Methodology	n	Respondent group	Age (years)
Abbott & Sapsford	2005	England	SE	On of the most deprived local authorities, namely Middlesbrough	Mixed method	561	Household members	50+
					Survey			
					Participants workshops			
Cheung & Leung	2013	China	SI	Hong Kong after financial tsunami	Observation	1352	Household members	Range: 18–88 Older =60+
					Survey			
Dwyer & Hardill	2011	England	Both	Remote rural communities in 3 regions	Individual and focus groups interviews	69	44 older rural residents and user of one of the 6 villages services	58–93
Guardiancich	2010	Slovenia, Croatia and Serbia	SI	Three ex-Yugoslav countries	Interviews	3	25 key informants	Not specified
					Risk biography			
Hrast et al.	2012	Slovenia NMS-12 EU-15 EU-27	SE	Comparisons Slovenia and other European country groups	Mixed method	Not specified	Adults Older people	18+ 65+
					Secondary data analysis			
					In depth interviews			
Hrast et al.	2013	Central & Eastern European Countries EU15 EU27 NMS-12	SE	Comparison CEE and other European country groups	Secondary data analysis	Not specified	Adults Older people	18+ 65+
Lee et al.	2014	US	SE	National data	Secondary data analysis	3820	Older Korean immigrants	65–75 75+
Löckenhoff et al.	2013	US	SE	Local community	Observational study: adapted version of Cyberball paradigm	40	Younger adults	22-39
						40	Older adults	58-89
Milbourne & Doheny	2012	Wales	Both	Rural areas	Mixed method	4000	Households in rural Wales	60–69 70–79 80–84
					Survey			
					In depth interviews	10	Older adults living in poverty	85+

Authors	Year	Researched countries		Context	Methodology	n	Respondent group(s)	Age (years)
Moffatt & Scambler	2008	Great Britain		SE	4 general practices in Newcastle-upon Tyne	Interviews	25	Older adults 60+ Max.=82
Moody & Phinney	2012	Canada		SI	Senior centre that provided home for the AHS programme	Participant observation Informal interview	~20	Seniors who met on a regular basis at a neighbourhood seniors centre for social and recreational events 65–90
						Interviews	9	Key informants Not specified
Morris	2008	Australia		SI	Inner city neighbourhoods in Sydney	Document review In depth interviews	15	Older public housing tenants 60+
Ogg	2005	Different countries	European	SE	3 country groups: Nordic (social democratic) Southern (residual) Eastern (transformation)	Secondary data analyses	5.065	Older adults 15–59 60–69 70–79
							18.515	Adults 80+
O’Shea et al.	2012	Northern Ireland & Ireland		SE	10 communities in different rural settings	Focus groups	62	Community stakeholders Not specified
Parmar et al.	2014	Ghana & Senegal		SE	Ghana: 27 enumeration areas in 5 underdeveloped and predominantly rural regions Senegal (Dakar, Diourbel, Matam and Tambacounda)	Survey	435	Older adults in Ghana 70+
							2933	Older adults in Senegal 60+
Percival & Hanson	2005	UK		Both	3 cities, Plymouth, Birmingham & London	Survey	400	Visually impaired 55+ Mean age men = 75 Mean age women = 79
Saito et al.	2012	Japan		SE	6 municipalities in Aichi prefecture	Secondary data analyses	13.310	Older independent respondents not facing problems with activities of daily living 65–70 70–74 74–79 80–84 85+

Authors	Year	Researched Countries		Context	Methodology	N	Respondent group(s)	Age (years)
Scharf et al.	2001	England	SE	Socially deprived neighbourhoods in 3 cities (Newham, Liverpool & Manchester)	Group discussion	Not specified	Older people	Not specified
Scharf et al.	2005	England	SE	Deprived urban communities (Liverpool, Manchester, London Borough of Newham)	Survey	581	Older people	Max.=96 60–74 75+
Shergold & Parkhurst	2012	Southwest and Wales	England SE	6 rural areas (North Cornwall, Dyfed, North Dorset, Powys, Gloucestershire, Monmouthshire)	Mixed method Survey	920	Older people	60–69 70–79 80+
					Interviews	38	Respondents of the quantitative sample with a range of mobility options and who were willing to participate	Not specified
Tong et al.	2011	China	SE	Shanghai community	Secondary data analysis	228	Older people living alone	60+ Mean= 79.086
Walsh et al.	2014	Ireland and Northern Ireland	SE	10 Rural communities	Focus groups	62	Community stakeholders	25 out of 62 stakeholders 65+
Whelan & Maître	2008	Ireland	SE		Secondary data analysis	6.085 15.539	Households Individuals	Children Working age adults Older people Not specified
Winterton et al.	2014	Australia	SI	Two rural communities in Northeast Victoria	In depth interviews	26	Stakeholders of community services and support	Not specified
Yuan & Ngai	2012	China	SE	Urban Shanghai	In depth interviews	10	Empty nest elderly	65–87 Mean=72.9
Yur'yev et al.	2010	26 Countries	European SE	Europe	Secondary data analysis Ecologic study	26 (Country level and aggregated data)	European countries	70+

