



The impact of government policy on social exclusion among older people:

A review of the literature for the Social Exclusion Unit
in the Breaking the Cycle series

Summary

Introduction

1. In summer 2003, the Social Exclusion Unit commissioned a review of the literature about the impact of Government policy on social exclusion amongst older people. The project is one of four reviews commissioned by the Social Exclusion Unit to help assess the impact of policy across all life stages. This review was carried out by Chris Phillipson and Tom Scharf of the Centre for Social Gerontology at Keele University.
2. Developing policies to combat social exclusion has been an important element of government policy since the election of the first Labour administration in 1997. These initiatives – set out in documents such as the Department for Work and Pensions' annual *Opportunity for All* reports – have been part of a wider debate about the meaning of social exclusion as a concept, and in particular the relevance of its application to groups such as elderly people.
3. This research examines the background to issues relating to social exclusion in old age, identifies the range of policies used to tackle exclusion, and considers evidence about the impact of policies designed to integrate older people into social and community life. The research is mainly based on evidence published until February 2004, though later publications have been included where possible.

Conceptualising social exclusion

4. The review takes a broad view of social exclusion and identifies four groups of conditions that might cause exclusion.
 - **Age-related characteristics** refer to the way in which older people are disproportionately affected by certain kinds of losses or restrictions relating to income, health or reduced social ties. Such changes might take place across all points of the life course but they are likely to feature more prominently in later life given income changes associated with retirement, the impact of chronic disabling conditions, and increased needs among people adjusting to living alone.
 - **Cumulative disadvantage** refers to the way that the same birth cohorts may become more unequal over time. For example, limited educational and work opportunities at early points in the life course may have long-term consequences in terms of reduced income in old age or limited awareness about how to access the full range of social and health services.

- **Community characteristics** highlight the way older people, who may have strong attachments to their locality, may also be vulnerable. Typically this concerns changes associated with population turnover, economic decline, and rising levels of crime and insecurity within neighbourhoods.
- **Age-based discrimination** refers to the impact of ageism within economic and social policies that contributes to various forms of social exclusion in old age. The debate around ageism has challenged the link with age as a form of dependency, emphasising instead various different forms of positive engagement that can be maintained throughout the latter half of the life course.

Review of policies

5. A wide range of policies could reasonably be viewed as trying to tackle social exclusion in one form or another. The selection of policies to be studied for the review was guided by the adequacy of research data, and their relevance to the social exclusion debate. The review addresses 19 policy areas grouped under four broad headings. These can, in turn, be linked to the drivers of social exclusion in later life outlined above. These are:
 - *Policies relating to income (age/cumulative disadvantage)*. For example, Minimum Income Guarantee, Housing Benefit and the Social Fund.
 - *Policies relating to health and social care (age/cumulative disadvantage/age-based discrimination)*. For example, Community Care policies and NHS Direct.
 - *Policies relating to urban and neighbourhood renewal (community characteristics)*. For example, Neighbourhood Renewal Fund.
 - *Policies relating to crime (community characteristics)*. For example, the Reducing Burglary Initiative and Neighbourhood Wardens.

Key findings

6. On the drivers of social exclusion in later life, the evidence suggests that in general, Government policy has been more successful in addressing exclusion based on **age-related characteristics** and **age-based discrimination**. By comparison, exclusion driven by **cumulative disadvantage** and **community characteristics** has proved more difficult to tackle.
 - **Taking the age-related area, government policy can claim some successes.** Particularly noteworthy, for example, have been the reduction in the proportion of older people on absolute low incomes; the stabilisation/ reduction in the proportion of pensioners experiencing relative poverty; the enhanced support for people with high levels of dependency; and the securing of innovations in the community care field. All these gains might be said to modify or reduce some of the pressures affecting people as they move into their 70s and beyond: for example, pressures that arise through the loss of income associated with retirement; problems stemming from chronic health conditions; and problems linked to the impact of changes associated with life course transitions.
 - **In contrast, social exclusion arising from cumulative disadvantage appears more resistant to change.** The proportion of those on persistently low incomes has remained almost constant since the early 1990s. This suggests a hard core of older people who have probably encountered poverty at points throughout their life, and who go on to experience high levels of deprivation in old age. Those who have traditionally been poor in old age appear to remain so, and these are also the groups who often fail in large numbers to claim means-tested benefits. Low expectations and a lack of awareness of services (a product of

cohort rather than age-related differences) have partly been addressed, for example through innovations such as NHS Direct and Care Direct. But even here it is noticeable that key groups continue to exclude themselves, and that the 'service-rich' probably do much better than the 'service poor' in utilising service innovations.

- **Problems arising from community change remain a significant driver leading to social exclusion in old age.** Some successes have been recorded with initiatives such as Neighbourhood Wardens, the Reducing Burglary Initiative, and individual projects under New Deal for Communities. However, there is no clear evidence that the needs of older people are being given systematic attention in urban regeneration schemes. Areas of high population turnover and economic deprivation remain an important driver leading to exclusion in old age. This is reinforced where feelings of insecurity produce restrictions on daily living. While worries or fears about particular crimes may have receded, concern about the 'unsafe' nature of urban communities remains high and may limit older people's involvement in a range of activities.
- **Measures designed to tackle age-based discrimination have been extensive and are beginning to produce a cultural shift in perceptions of older people.** In some respects this is not an easy target to measure, and systematic evidence on the impact of policies has yet to be collected. Also, some of the most significant policies designed to challenge ageism – such as the National Service Framework – are still at an early assessment stage. But the range of activity is impressive, notably through the activities promoted by Better Government for Older People, a number of community-based activities in Health Action Zones, community care work, and the development of a range of policies around older people and pensions in the Department for Work and Pensions.

Suggestions for future policy development

7. Arising from these key findings, the review concludes by suggesting three types of policy development that it might be important to consider.
 - Monitoring the impact of new types of poverty and social exclusion which emerge in old age. Some groups, such as divorced and single women with inadequate pension provision, are likely to need policy intervention in order to prevent new forms of social exclusion.
 - Community care policies need to be broadened to embrace the social exclusion agenda more effectively. While the extent of change in this policy area has been extensive over the past decade, there is a case for widening the scope of this work and extending the ambitions of care in the community.
 - In all areas certain groups still remain excluded from key services and benefits. However, the differences between and within groups – such as minority ethnic groups, those with mental health problems, or people with disabilities – can be large. The next phase of the social exclusion debate needs, therefore, to acknowledge these complex differences and the implications of this for new forms of social exclusion.

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Telephone: 0870 1226 236, Fax: 0870 1226 237, Email: seu@twoten.press.net

Published by the Office of the Deputy Prime Minister. Printed in Great Britain, September 2004,
on material containing 75% post-consumer waste and 25% ECF pulp.

Product code: 04SEU02466