CODEWORKS ATL Assistive Technology Lab

THE AGEING WORLD
ISSUES FOR OLDER PEOPLE: 2005 – 2025

A Report of Initial Findings
of research conducted by

CODEWORKS ATL

in association with
Age Concern Research Services

June 2005

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ABOUT CODEWORKS

CODEWORKS is the economic development company for the North East's digital industries. Established in January 2004, CODEWORKS serves as a catalyst for change, innovation and growth in the Regional economy. Its objective is to create jobs and wealth for the North East of England by fostering the growth of the Region's digital industries and, over the next decade, building global leadership in specific areas of digital media and technology.

Since its inception, CODEWORKS has delivered £25million in economic impact representing a return on investment of over 1000%. It has also helped to create or secure 263 jobs in the North East. In addition to the CODEWORKS ATL project, CODEWORKS leads two regional trade associations, a corporate finance practice, a number of digital media initiatives and in raising and changing the profile of the North East.

For more information about CODEWORKS visit:

Website: www.codeworks.net

ABOUT AGE CONCERN RESEARCH SERVICES (ACRS)

ACRS was established in 2003 to provide a professional and independent market and social research consultancy service for Age Concern, commercial businesses and non-commercial organisations. It is a division of Age Concern Enterprises Ltd.

ACRS manages an annual benchmarking study of older people in the UK ("LifeForce") and an on-going Panel of 10,000 older people ("50plusview Panel") in conjunction with GfK.

ACRS has a qualitative facility ("Age Concern Consultation Service") which conducts in-depth research among older people through one-to-one interviews and group discussions.

For more information about ACRS contact:

Website: www.ac-rs.co.uk

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FOREWORD BY ANDY ALLAN

Public debate concerning the dramatic demographic shift to an older society has come to the fore only relatively recently and yet it is one of the major challenges facing all of us in the next 20 years. As people in the UK live longer and those aged over 60 become the dominant demographic group, governments will need to consider how public services will evolve to support living standards.

Businesses will need to adapt to capitalise on commercial opportunities. The 18-29 age group will no longer be the prime target for marketeers once the over 60s become the largest social group and the group with the biggest spending power.

Next year will see the first of the 'baby boomer' generation hit 60. This 'new old' will be far more demanding than previous generations. They are expected to be 'younger' in outlook and more vocal.

This does not imply that the over 60s are a homogeneous group, with common views and values. Over 60s come from all walks of life, have vastly different personal circumstances and a whole gamut of interests. Businesses targeting the over 60s as a single group are unlikely to achieve success.

What **is** common to all older people is a number of key issues and challenges in life, some of which affect people of all ages, but most of which are specific to people as they grow older.

It is an understanding of this common ground that is the subject of this report. There is a wide range of issues raised by older people, but personal health, wealth and independence come to the fore for most respondents. This gives a clear message to government and businesses about where their priorities should be placed.

Ageing population is a worldwide trend and a global business opportunity. CODEWORKS is building a consortium of industry and research partners to put the UK at the forefront of this emerging market sector. It promises to be a fascinating next 20 years!

Andy Allan
Chairman
CODEWORKS

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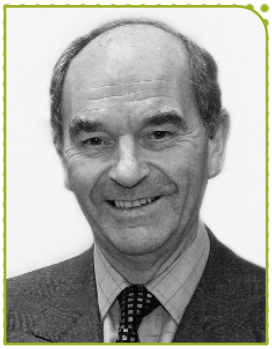

FOREWORD BY JAMES WRIGHT

We are all familiar with the 'solution in search of a problem', the endless electronic devices advertised in catalogues coming through our letter boxes and responding to needs which we already meet in other ways or never knew we had.

That is the last thing that older people, so many of whom work on limited budgets and live with fears of financial uncertainty, should be offered. That is why Age Concern is delighted to be working with CODEWORKS to try to identify the problems that older people themselves perceive as likely to affect them now and in the future. By adopting this approach we will be able to provide technology based support which responds to users' own perceptions of their needs – and which will therefore be used, rather than left languishing in a corner or in a drawer.

The comprehensive battery of tools which Age Concern Research Services can deploy is carefully designed for this kind of work. Large-scale surveys, in-depth discussions with smaller groups, and careful consultation of a wide range of professionals combine to give the comprehensive and balanced picture, which is essential if new products and services are to meet the real needs of older people.

This survey gives insights that will be invaluable not only in the technological area, but for anyone who is trying to provide what older people require to enable them to lead full and active lives as major contributors to the community.

James Wright CBE DL
Chairman of the Board of Trustees
AGE Concern England

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SUMMARY

CODEWORKS commissioned Age Concern Research Services to undertake a market research project exploring the top ten issues facing older people. The resultant national survey reveals the concerns that older people in Great Britain have now, and think will be the concerns of older people in 2025. It also reveals the changes that older people think might happen in that time period, and whether they will definitely or possibly happen.

Group discussions with older people, along with the views of experts from The Institute of Ageing and Health at Newcastle University, helped to develop both the issues that were tested in the survey, as well as shedding light on how older people think about their lives and needs, and how others think about them too.

A number of key themes emerged:

- Health, particularly physical health, is the main single issue concern in older people's lives now, as it will continue to be. The threat of current diseases is thought will be tackled by advances in medicine, but other physical health threats are expected to impact on the older population.

- Older people do not associate the need to maintain physical health with concern over lifestyle issues, such as smoking, drinking, diet and exercise, however, which is ranked far lower. What they expect and are concerned about is access to local high quality health and care support when they need it.

- They want 'independence'. This was expressed as the perceived need to be as active as possible for as long as possible in people's own homes (that is outside institutional care), and it ranks as high if not higher than physical health. Support is needed, but people wish to manage increasing frailty effectively, and to be treated with dignity.

- Linked to the need for support are concerns about access to local health and care services, with more older people also believing that healthcare will increasingly be provided by the private sector. This may fuel uncertainty over longer term financial security.

- The role (strength and value) of the family is a key issue too, with many older people commenting about concerns they have for younger people who may not have the same aspirations or concerns as themselves, and may have a narrower view of issues.

- As people get older and more dependent they become increasingly

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concerned about crime and security, and the survey indicates that many older people believe that this will become an even greater concern in twenty years time.

- The survey indicates some of the drivers of this fear, with a significant number of people surveyed believing that as the proportion of older people in society increases, then older people will not be seen as presenting a positive opportunity. There will be a greater difference between younger and older people, which will increase the degree of social exclusion for older people. This could fuel prejudice and discrimination and also alienate people from each other.

- The survey shows that many older people believe that people will become more isolated in their communities, and that differences between people due to wealth and geography will also increase. This will be of concern to Government, communities, policy makers and social support agencies.

- Given increasing house ownership and property values, people have become more demanding regarding housing choice, and may well want to exercise that choice in how they can adapt their homes to suit their changing circumstances, rather than moving into supported accommodation.

- Although there is considerable (emotional) rejection of the idea of living out one's life in a care home in the survey, this does not appear associated with either people's feelings about independence, or having their homes adapted to enable them to live in them. This is much more likely to be a real issue when they need to consider it, but until then they will continue to hope they can manage in their own homes.

The CODEWORKS Assistive Technology Lab ("CODEWORKS ATL") seeks to enable technology make a meaningful difference to all aspects of older people's lives. CODEWORKS ATL is about identifying problems and developing technology-based solutions. The starting point for every product is a clear understanding of the needs of the end user, typically the older person or their carer network.

A number of key technology-related issues have been identified by the market survey:

- Technology and communications will make a difference, and are perceived to have a high likelihood of both improving lives, and improving the ability to keep in touch, wherever and whenever. What some older people are concerned about is the lack of immediate personal contact that they will have with those around

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them and dearest to them, as they retreat into their own homes.

- As more older people work on later in life, then technology should also enable people to achieve better balance between increasingly complex demands.

- There is an opportunity for technology to enable older people to live more effective healthy lives in the way they wish, without isolating them within the confines of their (or any) property.

The challenge for CODEWORKS and other technology providers is to develop well thought out technology applications, based on a thorough understanding of the issues facing older people.

This report of initial findings has been produced for 'ActiveAge' – a series of discussion events focused on the use of technology for ageing society. The full report will be published around the end of July 2005. As part of its contribution to raising awareness of the issues facing an ageing society, CODEWORKS will make the report freely available via its website (**www.codeworks.net/atl**). The underlying dataset will also be made freely available to universities for further research.

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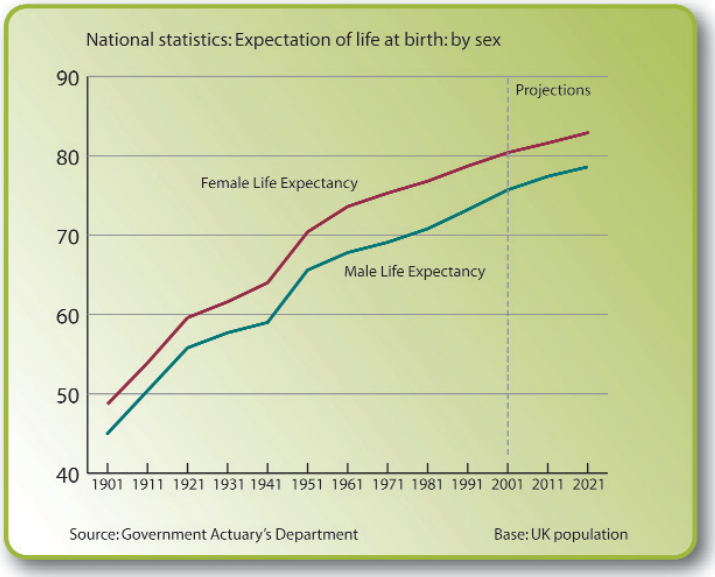
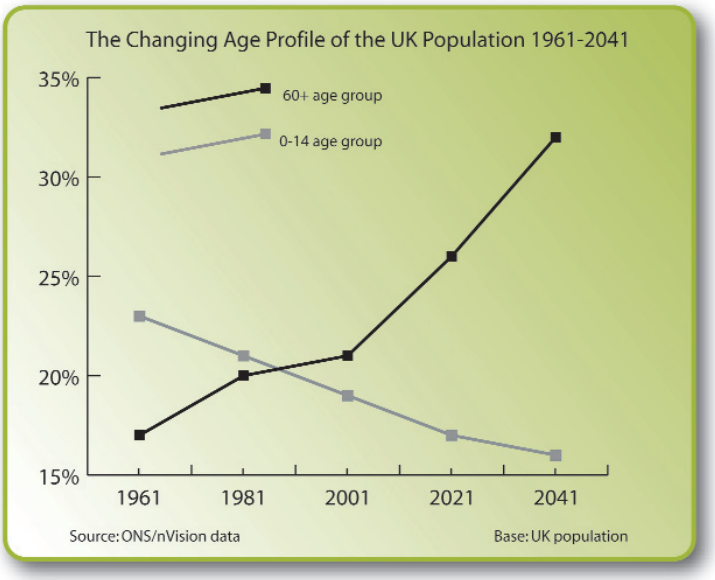
INTRODUCTION

We are living in an ageing world

The changing demographic profile of the older population has been extensively commented on. Advances in medical science and technology mean that people are now living longer than ever before. Life expectancy continues to increase.



When linked to the fact that people are putting off starting families until later in life, and the decline in total fertility rate and therefore the number of children in families, this means that comparatively older people (aged 60+) comprise an increasing proportion of the population than younger people (aged up to 14) than ever before, as the graph below indicates.



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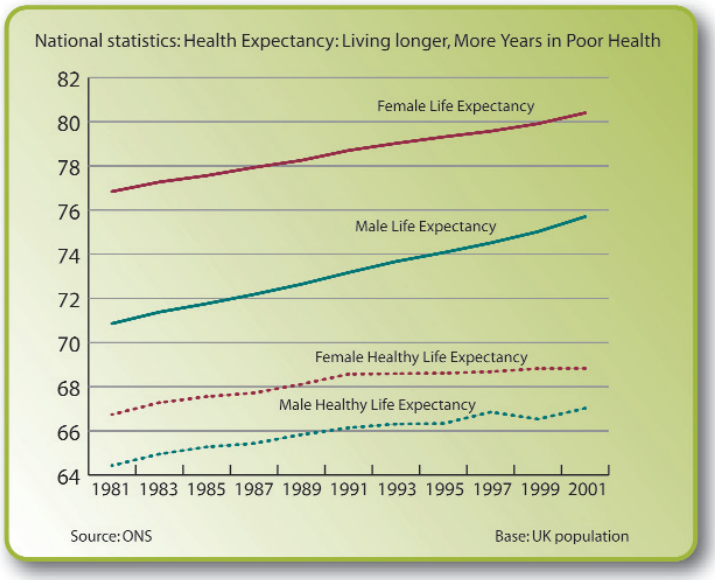
As a consequence of people living longer and the birth rate declining, the average age of a person in the UK will rise by five years, from 39 today, to 44, in 2041. While life expectancy for 65 year olds increased by just one year in the 120 years prior to 1960, it has increased by one year in each decade since and is forecast by the Government Actuary's Department to increase by a further five years by 2041.

This is not, of course, a UK phenomenon but one shared by most other countries, with Japan, Spain and Italy, in particular, all having half their total population already aged over 50. And, in all cases, it is a trend that is continuing and, indeed, accelerating and it will change society as we know it.

Not only are people living longer, but there is concern as to whether or not ill-health in later life is also increasing, and debate as to whether or not the period of ill-health preceding death is rising. ONS data (see chart below) shows that healthy life expectancy is increasing too, but not as fast as life expectancy – the gap is widening.



However people still expect to retire from the active workforce at traditional retirement ages of 60/65, leaving them a further 20/15 years+ of life. These patterns by themselves create a challenge for Government, policy makers and businesses.

Global challenges and global opportunities

This dramatic change in the age profile of all countries will present significant economic and social challenges to governments and citizens. Some of the key issues (scenarios and perceptions) at play now and for the next twenty years might be summarized and hypothesized as follows:

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1. there are more older people, and comparatively fewer younger people;

2. the net impact of inward migration is unpredictable but will slowly make itself felt, albeit in specific localities;

3. patterns of internal migration, particularly the movement of older people out of urban areas, and the increasing location of younger and migrant people in urban centres creates an economic as well as a demographic imbalance;

4. people live longer, and may live longer in relatively good health (the period of ill health prior to death might not expand as age increases);

5. changes in lifestyle (diet, consumption, exercise) will impact on the health profile of older people, depending on whether lifestyle changes are made in time to influence later health (for example the rise in obesity may prove more difficult to manage than just by changing which food products are available);

6. people value independence even more, and want to stay active as long as possible;

7. traditional modes of care for older people are changing, and increasing emphasis is placed on enabling older people to receive support and treatment in and around their homes;

8. care in the community increases in requirement by reduction in the provision of nursing homes, but changes in society and family connections and structures make it increasingly difficult for people to stay in their own homes;

9. technology plays an increasing role in enabling people to remain independent, for example by improving remote monitoring; by providing communications linkages and information flows; by providing solutions to technical problems around home living etc

10. patterns of healthy living are changing, albeit slowly, as emphasis increasingly shifts to preventative advice and support, and interventions to force change (pressure on convenience food advertising for example to slow the rate of growth in obesity in the population);

11. the boomer generation will, it is believed, have an impact on society through the different attitudes and behaviours they express from their predecessors;

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12. patterns of housing tenure have changed significantly in the last twenty years resulting in far more owner occupiers with greater asset values that are more likely to be used in life than handed over in inheritance to their children (the SKIer[1] generation);

13. income and asset inequalities will increase between the younger and the older, and between urban and rural dwellers. There will increasingly be geographic inequality given the role and economic value of the South East, unless there is policy and practical intervention to reverse these trends;

14. Older people will need to remain economically active for longer, especially as people have not made provision for later life and there are increasing shortfalls in pension provision. There is also increasing uncertainty regarding financial security in retirement due to the shift from final salary pension schemes to defined contribution schemes.

15. Older people fight for recognition of enduring value until health fails, and being more entrepreneurial (one of the boomer 'traits' along with being more vocal, assertive and demanding) become a focal point for business development and efficiency;

16. The generations entering older age (50-65 year olds) are increasingly technology able, both through exposure and use in work, and the need to connect to their children and grandchildren. Take up of mobile technology among older people is surprisingly high (67% among LifeForce[2] respondents) although internet usage and home PC ownership still lag behind the general population, but not by as much as other commentators might have us believe. Take up of different communications and information devices in the LifeForce survey is shown below:

Communications/ information device	Take up %
Mobile phone	67
Home computer	39
ISP (internet access)	34
Telephone banking	22
Online banking	11

17. Younger older people (the 50-59 year olds) are more likely than their predecessors to try new ideas and approaches (because they did this in their more rebellious youth), and have the financial scope to invest more heavily in innovative products. Whether they are early

[1] Spend Kids Inheritance
[2] 'LifeForce' is an annual survey of 1500 older people in the UK conducted by ACRS

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adopters of new technology will be an interesting issue to track;

18. Changes in flexible working patterns become much more the norm for older professional people, and portfolio working across a range of employers becomes more prevalent. This breaks up traditional patterns of employment and demands new roles and relationships between buyers and suppliers;

19. Volunteering for charity work becomes less prevalent, as people donate more money in real terms to charities and to meet traumatic global events, but have less disposable time to help. The caring society becomes more removed from the model we have been used to seeing in the post-war period;

20. Due to demand far out-stripping supply (or willingness to change service delivery models) people change to buying what they need when they need it, and become less reliant on traditional models of provision and support in health care and domestic flexibility. This impacts on their housing, and on social care in their locality. Failure to provide flexible community care for older people (lack of available land; planning restrictions) creates demand for new models of support and care.

Where there is change, there are commercial opportunities. CODEWORKS believes that much of this commercial opportunity will arise from the application of digital technology towards solving many of the issues faced by societies.

Technology can meet the challenge

The fundamental technology building blocks that are needed – computers, the internet, broadband, mobile phones, wireless communications etc – are all now readily available. However, the vast majority of technology companies are focused on younger consumers or the workplace environment. Those products that are developed for older people tend to be either adaptations of existing products to give access to disabled members of society, or are provided by relatively small, niche providers.

The challenge for technology providers is to develop well thought out technology applications, based on a thorough understanding of the issues facing older people. Successful products will almost certainly be developed in a multi-disciplinary environment, including clinicians, medical researchers and practitioners, psychologists, industrial designers and computer scientists.

Bringing together experts across the spectrum of disciplines is a challenge in itself, one to which CODEWORKS has risen by creating the CODEWORKS Assistive Technology Lab ('CODEWORKS ATL').

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CODEWORKS ATL is bringing together talented individuals and groups within industry and academia from the UK and around the world.

CODEWORKS ATL is about identifying problems and developing technology-based solutions. The starting point for every product is a clear understanding of the needs of the end user, typically the older person or their carer network. CODEWORKS ATL then assembles the required team of experts from a range of disciplines.

Identifying wants and needs

Many innovations in product and service development and design are technology-led, and create marketplaces that are supplier/product driven rather than predicated on consumer needs and demands. Companies then have to create that demand by marketing the benefits and values of the technology to consumers. 3G telephony is a good example of this. It is only by showing consumers what is possible that demand is stimulated and markets created.

However, as identified above, much of the development work in CODEWORKS ATL is about good applications of existing technology. As such, products need to be more market-led and consumer-led.

Successful commercialisation of such products therefore requires a thorough understanding of the older consumer's wants and needs and this is often very different to that of other consumer groups. Consumer behaviour of older people often reflects an unwillingness to accept that the need for the product exists – denial and issue avoidance. This results in products not being bought or provided by third parties (relatives or the public sector) but not used. Consumer behaviour also most often reflects particular aspects of the individual older consumer, with personal physical and mental health and financial circumstances playing a far more important role.

CODEWORKS believes that understanding the consumer is the key to success in this market and much of the background research work being undertaken involves leading psychologists and qualitative research (in-depth interviews and focus groups) among consumers. Whilst researchers can give valuable input into the product development process, a key 'expert' group is older people themselves.

The challenges facing an ageing society are many and varied. In order to provide a focus for development effort, CODEWORKS commissioned Age Concern Research Services to undertake a market research project exploring the top ten issues facing older people now and in 2025. This will then enable CODEWORKS and its partners to focus on those areas that older people themselves feel are the most important.

The research was designed to understand and provide insight into the

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changing nature of the issues and concerns of older people in Great Britain, both now and looking into the future.

The full research programme was conducted by a mixture of qualitative and quantitative techniques, involving group discussions with older people in three areas of England; an expert panel conducted with leading academics at The Institute of Ageing and Health at Newcastle University; and extensive consumer research among over 1,000 people aged 50 or over in Great Britain.

This Initial Findings Report provides an initial view of the overall findings of the research survey undertaken by ACRS through TNS. The full report of the research will be available in July 2005.

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INITIAL FINDINGS

Three group discussions with a wide range of older people; an Expert Panel with leading academics, and a detailed survey of older people in Great Britain were undertaken to ensure that the research reflected as wide a range of perspectives as possible. In total over 1050 older people gave their views on the issues that concern them now; whether these issues might concern them (or people like them) in twenty years time, and also their views as to whether or not certain changes might happen in society.

This provides invaluable assistance in giving a framework of understanding about how older people think, and how the future might change with many more older people living longer than hitherto, and with a declining proportion of younger people in the population.

This presents both challenges and opportunities, for Government, including devolved regional bodies, and agencies such as CODEWORKS, who are seeking to stimulate economic growth and have recognised the significant role that will be played by older people, and the opportunities that might exist if technology could continue to make a greater contribution to the regional and national economic and social development.

This executive report provides an overview of the Group and Expert Panel views, and then provides some initial findings from the Survey.

THE GROUP VIEWS

The intention of the groups was to use them as sounding boards in generating the issues and themes to test in the main survey. However they also provide invaluable diagnostic pen portraits of older life in specific locations and among different social and age states.

Group 1:

Aged 70+ including 3 x 80+; C2DE; half on state benefits only; North East England - urban focus.

Being an older and relatively financially insecure group, the focus tended to be more on physical and mental health, with concern about managing the transition from active social lives to increasing dependence. Finance features more as an issue here than with the other groups. This group had a wider but more concerned perspective on issues in twenty years time.

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TODAY	2025
1. Physical Health	1. Physical health
2. Mental Health	2. Mental health
3. Activity / social life	3. Increasing frailty
4. Independence	4. Better quality of life (more will be curable)
5. Finance	5. People will have to work longer
6. Crime	6. No welfare state – NHS, benefits, etc
7. Transport/travel	7. Natural resources will run out
8. Accommodation	8. Climate change can only get worse
9. Care	9. People will have less say in running the country
10. Family & friends	10. World war

Group 2:
Aged 60 – 69; 50:50 still working & early retirement; BC1; most with private pensions; Midlands - suburban focus; 2 BME respondents.

This group was more affluent and had greater opportunity. They were also balancing more complex demands, and were outward looking.

TODAY	2025
1. Own health	1. Independence
2. Health / social services	2. Physical health – specifically mobility
3. Family	3. Mental health
4. Time management – work/life balance	4. Finances/wealth
5. Politics/government policy	5. Social opportunity/activity
6. Finance	6. Family
7. Crime/security	7. Location/residence
8. Planning for the future	8. Social care
9. Loss of faculties – beyond our control	9. Coping with change
10. Positivism	10. Dignity

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Group 3:
Aged 50 – 59; C1C2; 3 retired early, one to start own business; South West -rural focus.

The younger group was more financially concerned at present, and saw this continuing through to older age as they continued to balance work and life choices relating particularly to young and older family. It was interesting that the rural group saw crime as the major issue facing older people in twenty years time.

TODAY	2025
1. Financial security	1. Crime
2. Provision for health – mental & physical	2. Environment/fuel
3. NHS/ Healthcare/Support/HR	3. Finance
4. Choice – work	4. Keeping up with technology
5. Transport	5. Dependence on family
6. Supporting kids/kids' futures	6. Inter-generational understanding
7. Economic awareness of younger people	7. Widening wealth gap – big problem
8. Continuing activities/interests	8. Vulnerability
9. Continuing to matter – others' perceptions	9. Remaining active (esp. in rural area)
10. Elderly parents	10. NHS/Healthcare

Overall summary

Whilst there are many concerns voiced by older people in these groups, all the respondents show an enormous amount of personal positivism and optimism. Surprisingly perhaps, the oldest group are still very cheerful and enjoying their lives very much, despite increasing frailty and decreasing mobility.

However, there are very real concerns throughout all three groups about the values and futures of young people both today and in twenty years. These concerns are not born of a stereotypical knee-jerk reaction to 'the youth of today' but of careful and measured thought and reasoning. They worry about young people's attitudes to finances and debt. They are concerned that younger people are not taking politics and the future of their country, the wider world and their planet seriously enough. They worry that through neglect, our attitudes to taking care of people, the sick, the weak, the poor, the homeless and the elderly, will slip in favour of making as much profit as possible and, in fact, they already see this happening. They fear that the priorities and values of younger people are skewed and trivial.

"Celebrity will be the goal of every young person, but where will the doctors & teachers and politicians come from?"

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However, we must not forget the very positive predictions for the future that these groups have made. There is a real belief in both the youngest and oldest groups that in the future age discrimination will not only be illegal but rigidly enforced. In fact, positive discrimination will be the norm and older people will be valued for their experience and reliability, especially in the workplace. They believe that with the huge advances in medicine and technology that they have seen within their own lifetimes that in twenty years cancer will be not only curable but preventable, surgery will be easy and 100% effective and almost everything will have a cure.

However many people feel that the widening wealth gap means that perhaps these treatments and cures will be available only to the well-off and that the poor will continue to get second class treatment in most things. This will be particularly true if their dire predictions for the welfare state come to pass.

In summary, the majority of the respondents spoken to believe that their lives are good now and will continue to be so as they age. However, their fears and worries are much wider than their own lives and they feel that it is entirely possible that the generations to come will ruin not only the environment but also the relatively democratic and caring society that they believe is present in Great Britain. They advise caution to the young and hope that they will take the time to look around them before it is too late.

"Email will become the only means of communication. They will forget to talk to each other face-to-face to solve problems"

THE EXPERT VIEW

There is a considerable similarity between the issues and concerns voiced by older people themselves and those that the Panel ascribe to them, albeit separated by differences in expression and context.

The main concerns expressed by the Panel are the inter-locked twin peaks of health and wealth, which are seen to be so important to each other that one could not be raised above the other in terms of relative importance. Again, in common with the older people spoken to, autonomy and freedom of choice are seen as imperative. Not only does independence allow older people a freer and happier life, it re-affirms their own feeling of self-worth. However the Panel was more polarised between those believing that life can only get worse for older people and those who believe it can only get better.

The Panel thought that future older life would be impacted by the way in which the state set the parameters for institutions to work for older people, and the way in which older people adapted to an increasingly changing society, with both opportunities but also threats.

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The lists generated by the Panel discussion should not be read as complete as there was considerable debate around the individual issues identified. Further Panel sessions will be held prior to publication of the final report.

TODAY	2025
1. Health and wealth	1. Health and wealth
2. Autonomy Choices Rights Respect Individuality	2. Change Not knowing Fear Adaptation New possibilities New threats
3. Environment Transport Crime Local services Shops	3. Role in society More of a challenge Economic burden – more people on benefits Intergenerational contract
4. Family Partner – alive / health Grandchildren Relationship with partner Elder abuse Intergenerational integration	4. Family dynamics Intergenerational contract
5. Role in society Status Employment Influence	5. Information technology (keeping in touch)
6. Change Immigration Implications of technology Post office and local banking	
7. Institutions Funding Increased demand as population ages	

THE SURVEY VIEW

What concerns older people now?

When asked to choose (from a list of twenty) which one issue concerns them the most nowadays, older people pick out two issues in particular:

- Physical health
- Independence (not stated as this in the survey, see terminology used in the tables)

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These two issues accounted for nearly half of the choices made by over 1000 people aged 50+ in the survey, and each accounted for over 20% of choices.

The next three issues were selected by between 5 and 10% of respondents:

- Crime and security
- Family values
- Access to health and care services

In addition 6% could not select any one issue as the most important to them.

The remaining 15 issues were each only selected by fewer than 5% of respondents.

Which one issue is most important nowadays?	
Base: All adults 50+	1050
Your own physical health such as illness, disease and mobility	25%
Being able to be physically and mentally active in my own way and in my own home for as long as I can	21%
Crime and security in your area	8%
The role, that is the strength and value, of the family in society	7%
Access to local health and care services	6%
None/Don't Know	6%
Being able to drive	4%
Your longer term financial security	3%
Availability and price of fuel and power, such as gas and electricity	3%
Changes in climate and environment	3%
Your own mental health	2%
Access to good public transport	2%
Being lonely through ageing and bereavement	2%
Quality and price of food	2%
How you manage your time between different demands	1%
Your lifestyle, such as diet and exercise, smoking and drinking	1%
Harmony and trust in your area between people of different ages and backgrounds	1%
Employment prospects	1%
Availability of suitable and affordable housing	<1%
Making plans for the future e.g. insurance, wills or funeral planning	<1%
Access to affordable technology and communications, such as computers, mobile phones or digital TV	<1%

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By asking people to select their three top issues, we start to see some additional granularity appearing. Physical health and independence are still the two main issues, (over a third pick either of these) but crime & security and access to local health and care services have also pulled away from the rest, being selected by over one in four respondents.

In addition there are seven secondary issues emerging, being selected by one in ten or more people:

Secondary Issue	%
Family values	17
Driving	14
Environment	13
Fuel	12
Public transport	11
Loneliness	10
Financial security	10

In summary, older people want to remain physically well as long as possible and active in their own homes. Linked to these twin issues is the need to have access to local health and care services to support them if they need them.

There are concerns about crime and security in the local area, which may be linked to concerns about the role that the family plays in society. Independence is linked to being able to drive for as long as people are able to. This is clearly a defining issue in determining the boundary between flexibility and ability and dependence and restricted living.

All of these factors are those which impinge on our individual ability to function in a society that is secure and stable.

The next level of concerns introduces larger scale issues involving climate and environment change, and the availability and price of fuel and power. If driving becomes an issue then having access to good public transport is imperative. However older people increasingly inhabit more rural areas, where public transport is less frequent and/or accessible (time and location).

Economic stability factors are also reflected in the level of expressed concern regarding longer term financial security. People also recognise the challenge posed by loneliness through ageing and bereavement.

Lesser factors include food, housing, employment, tolerance, lifestyle and access to technology. However this does not mean that these factors are of no concern at all to people.

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Which three issues are you most concerned about?	
Base: All adults 50+	3 most concerned about
Your own physical health such as illness, disease and mobility	39%
Being able to be physically and mentally active in my own way and in my own home for as long as I can	37%
Crime and security in your area	27%
Access to local health and care services	24%
The role, that is the strength and value, of the family in society	17%
Being able to drive	14%
Changes in climate and environment	13%
Availability and price of fuel and power, such as gas and electricity	12%
Access to good public transport	11%
Your longer term financial security	10%
Being lonely through ageing and bereavement	10%
Quality and price of food	9%
Your own mental health	8%
Harmony and trust in your area between people of different ages and backgrounds	8%
Your lifestyle, such as diet and exercise, smoking and drinking	6%
Availability of suitable and affordable housing	5%
None/Don't Know	5%
Making plans for the future e.g. insurance, wills or funeral planning	3%
Employment prospects	3%
How you manage your time between different demands	2%
Access to affordable technology and communications, such as computers, mobile phones or digital TV	2%

Overall levels of concern

The survey issue identification process started by asking people to state how concerned they were about each of these issues nowadays. This is shown in the table below, which plots each issue against the rating scale, ordering the issues by mean score.

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Overall levels of concern					
	Concerns me a great deal now	Concerns me quite a lot now	Concerns me only a little now	Doesn't concern me at all now	Mean*
Independence	42%	27%	18%	13%	65.8
Access to health care	36%	29%	20%	16%	61.7
Family values	34%	29%	21%	15%	60.1
Physical health	31%	24%	28%	16%	56.1
Fuel	29%	27%	23%	21%	54.4
Crime & security	27%	26%	31%	16%	54.4
Public transport	28%	23%	23%	27%	50.8
Climate	24%	28%	24%	25%	50.4
Food	21%	29%	28%	22%	49.4
Social cohesion	19%	23%	28%	30%	43.4
Driving	27%	13%	12%	48%	39.5
Financial security	17%	20%	27%	36%	39.1
Mental health	21%	15%	22%	42%	38.2
Loneliness	15%	17%	31%	37%	36.5
Lifestyle	13%	20%	29%	38%	35.8
Future planning	12%	17%	29%	43%	32.8
Housing	15%	17%	19%	49%	32.5
Time management	8%	16%	31%	45%	28.8
Access to IT	8%	14%	21%	57%	24.2
Employment	8%	8%	11%	73%	16.9

*Mean: calculated by attaching a value of:
100 = concerns me a great deal; 66 = quite a lot; 33=a little; 0=not at all

Nine factors are now seen as being of great or quite a lot of concern to over half of the older people interviewed, with seven being seen as of great/quite a lot of concern to fewer than one in three.

What might concern older people in twenty years time?

Perhaps not surprisingly older people see these issues much in the same order of concern, with physical health and independence as the most important issues, followed by access to local health and care services, and then crime & security in their area.

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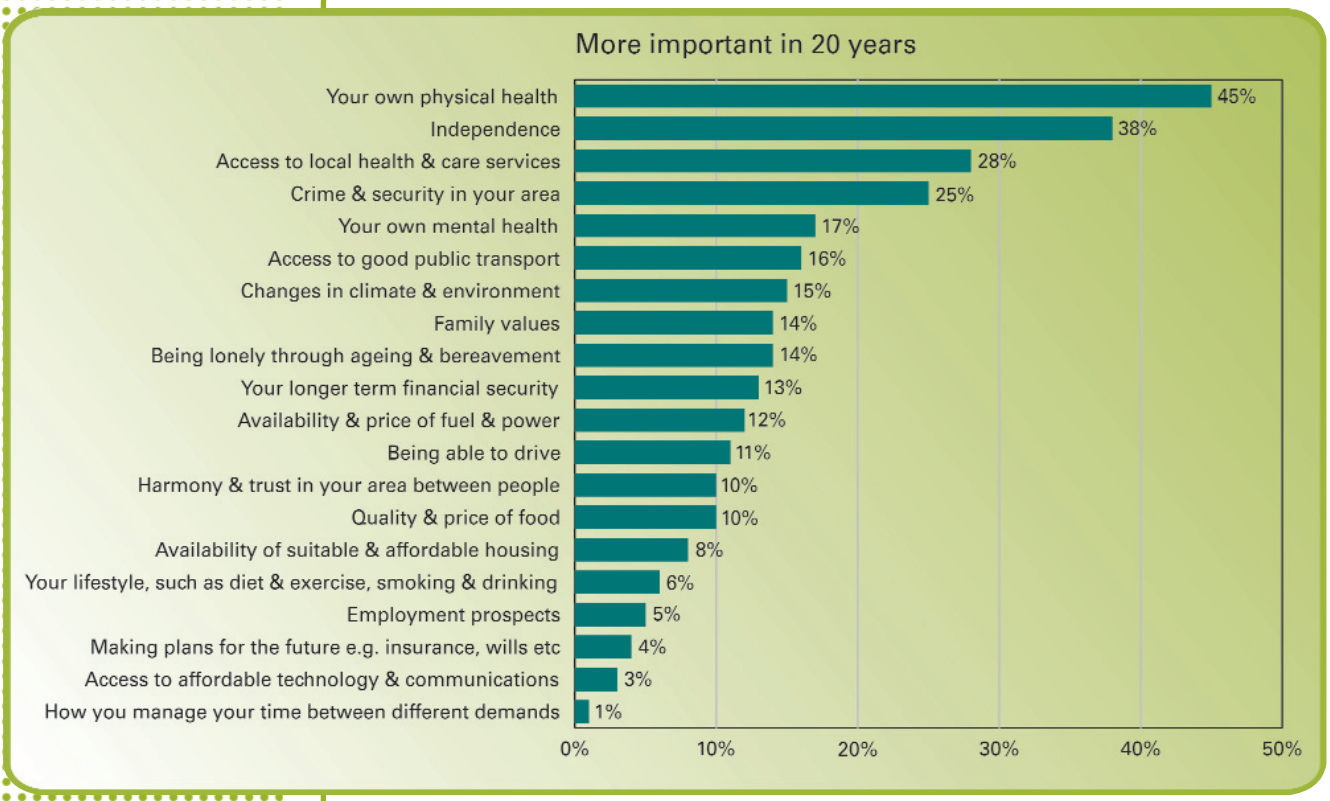

The corollary is true for those issues perceived as being of least important in 20 years, with employment prospects in particular being singled out. This may not be as true as people might like as we work our way increasingly into what has traditionally been seen as the ages of retirement to be able to afford our pensions.

Being able to drive was seen as being less important by 23% and access to affordable technology and communications by 19%.

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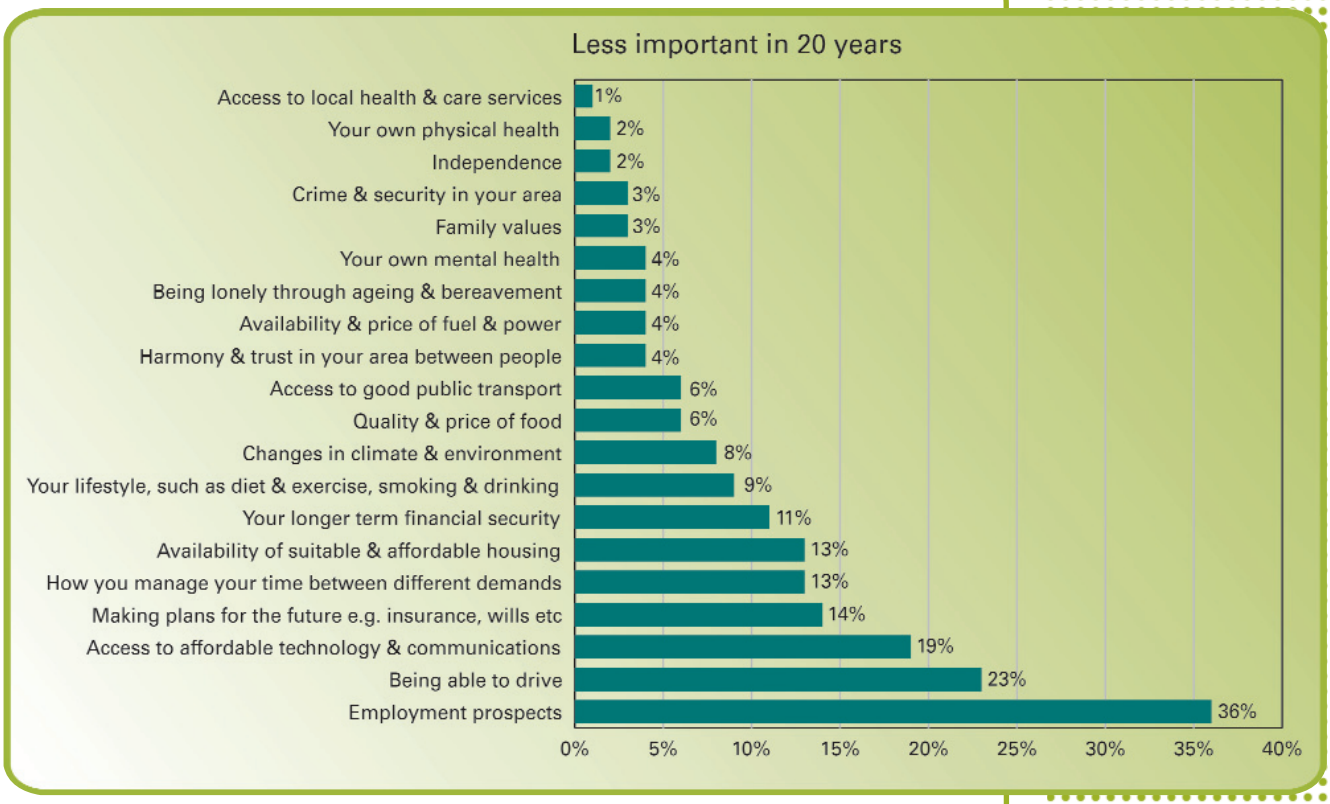
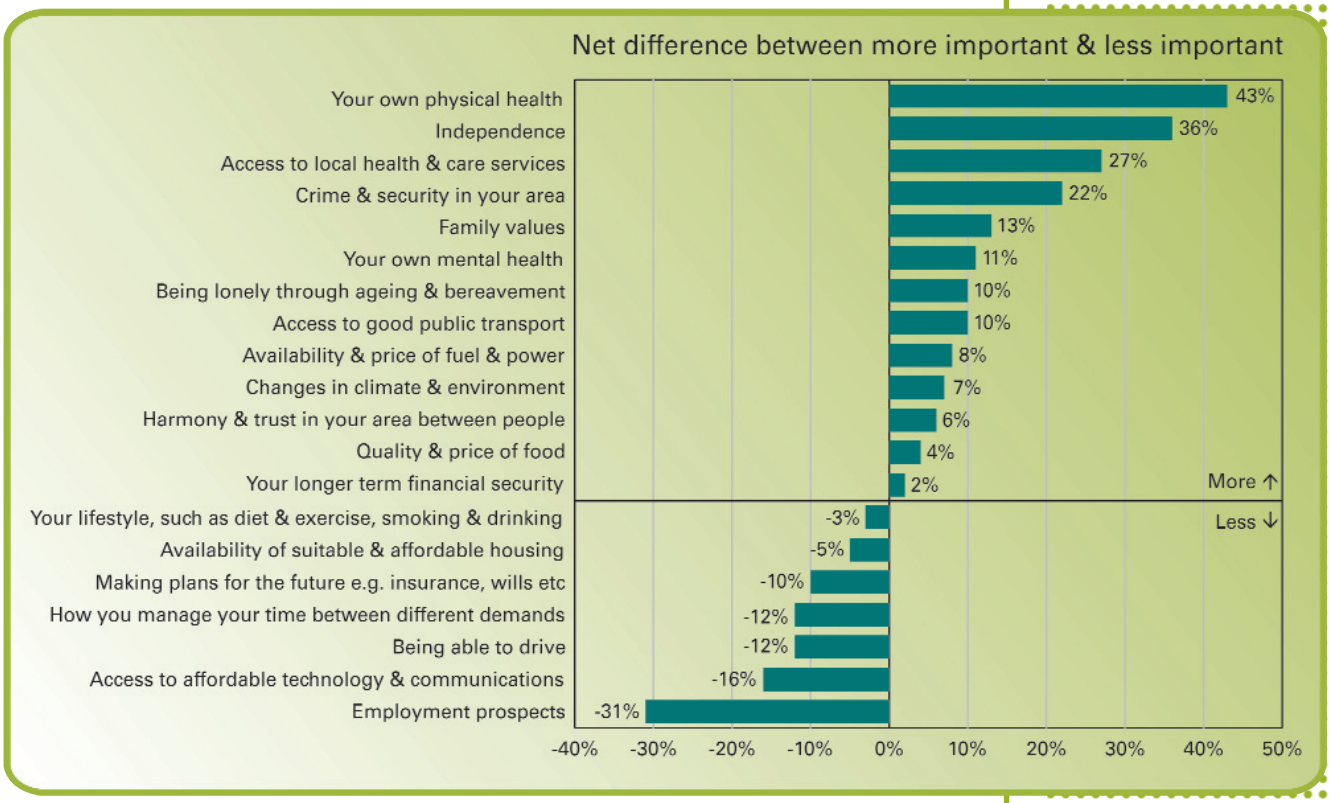


If we now look at the difference between these two ratings, we can see the balance of opinion between these two views:



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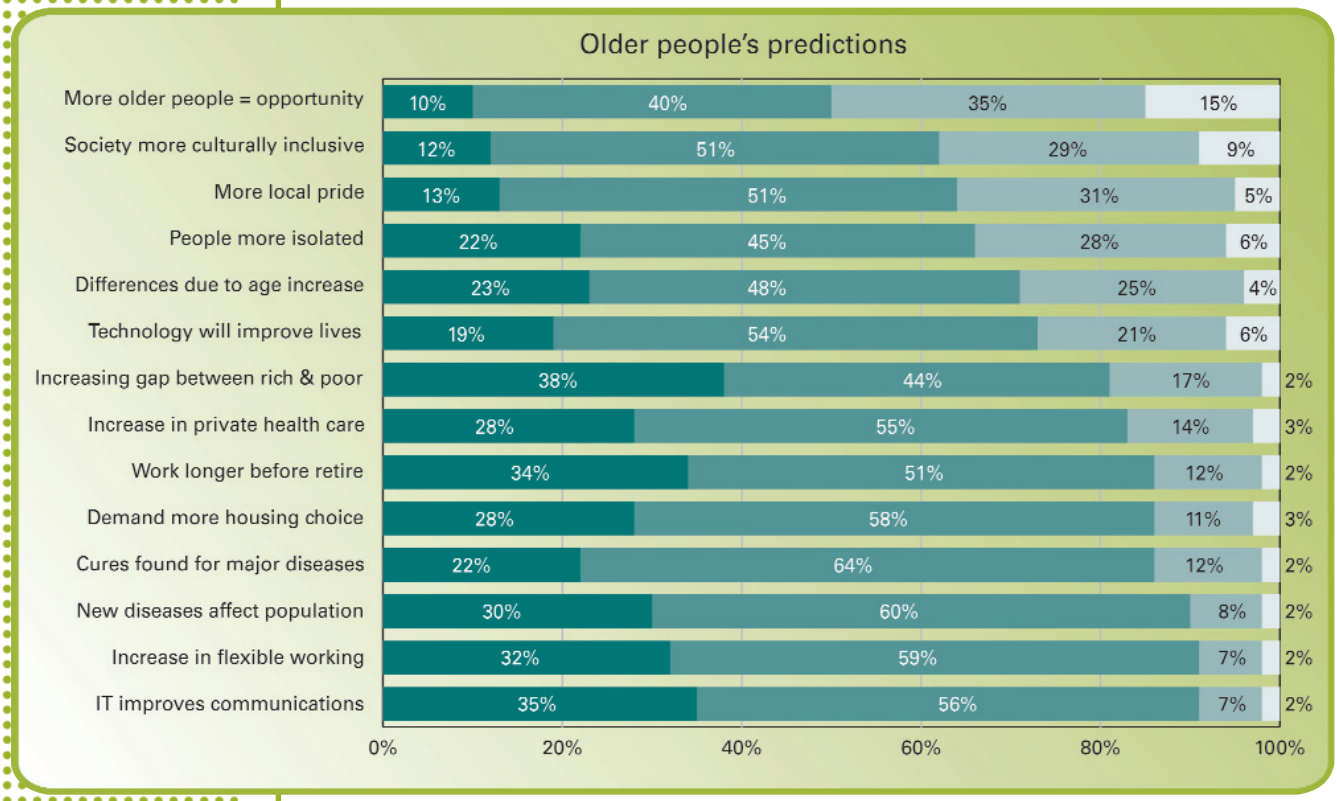
Five issues are clearly perceived as likely to diminish in importance to older people in twenty years time: employment prospects; access to affordable IT; being able to drive; time management; future planning; availability of suitable and affordable housing, and lifestyle.

What might happen between 2005 and 2025?

The survey asked people to "predict" whether each of 14 scenarios were definitely or possibly likely or unlikely to "come true" in the next twenty years. Over half of these were couched as positives or neutral, but some (6) were negatively stated to ensure that people thought about each statement.



Three were seen as more likely than others, with around one in three thinking they definitely would happen, and only one in ten thinking they would not:

- "Mobile phones and computers will help people keep in touch more often"
- "People will become more flexible in how they work"
- "New diseases will affect the population"

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Two other scenarios were thought definitely likely by over one in three interviewed, but had stronger opposition from one in five/six of those surveyed:

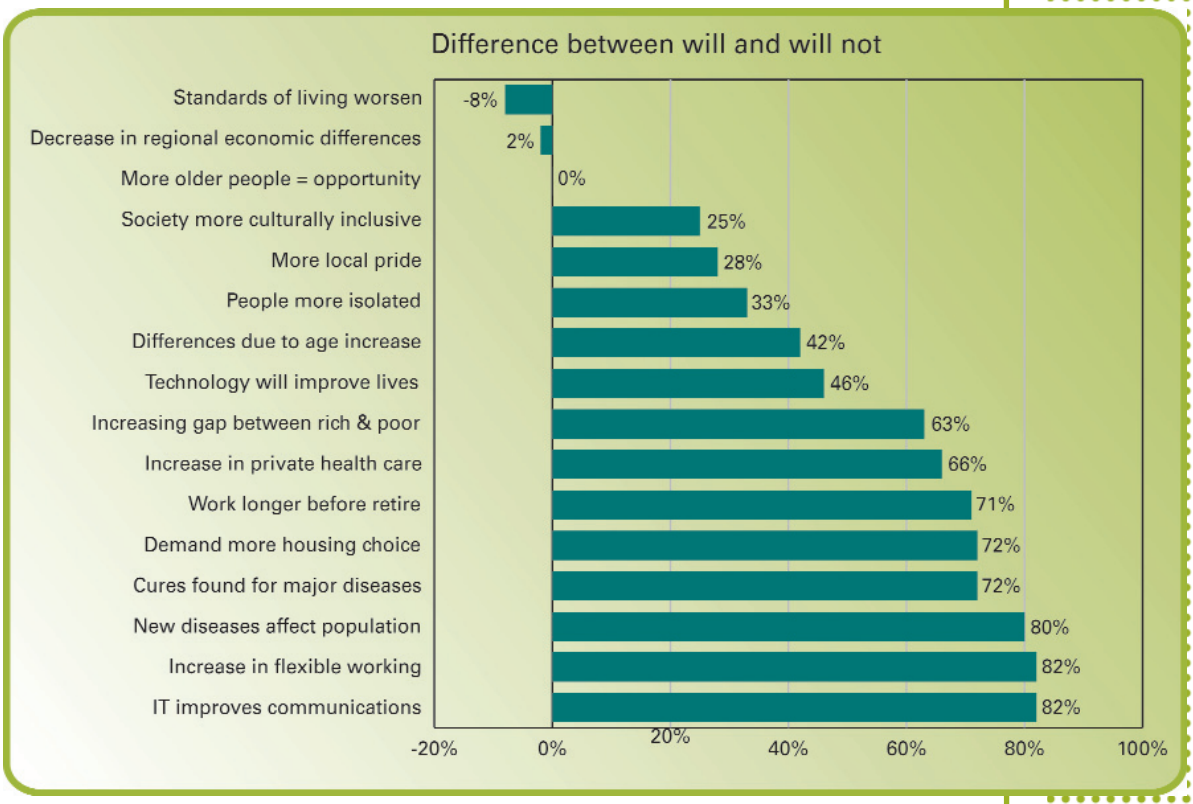
- "People will work longer rather than retire"
- "The gap between the rich and the poor will get bigger"

Given the importance of the number of older people in society it is interesting (or worrying) to note that as many people thought that "having more older people and fewer younger people in society will be an opportunity not a problem" as thought this unlikely to happen, but with more people feeling pessimistically about the future.

If we take the difference between those who think these scenarios will happen and those who think they will not, we find only two scenarios where people generally believe they will not happen:

- "Standards of living will get worse"
- "Economic differences between regions will gradually decrease"

Slightly more people expect to have a similar standard of living in the future than as now (or better) but also expect that the gap between regions in terms of economic prosperity (and therefore standards of living) will get worse.



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Initial Conclusions

In summary, if these views were to hold into the future, we might expect to see a society:

- that has a bigger gap between rich and the poor, and between people in different regions;
- that has found a way of combating known diseases, but has also been affected by new diseases;
- that finds it increasingly difficult to treat older people as positive contributors to society, with increasing polarisation between younger and older people, which might cause greater prejudice, intolerance and discrimination;
- that is more demanding of accommodation in later life, but will also have to plan for increasing private sector health care provision;
- that will work on later in life due to inadequate pension savings, but in a more flexible manner;
- where people have become more isolated where they live, and society less inclusive, with people taking less pride in their environment; and
- where people keep in touch more by improved tele-and IT-based communications and where technology has made a greater contribution to improving people's lives.

The technology opportunities are therefore:

- through assistive technology in homes for later life, although this will have to win people over who see adaptation as a response to diminishing ability rather than enabling continuing capability;
- to provide integrated solutions for people to manage flexible working and time more effectively;
- in finding solutions that will ensure that older people continue to be mobile in later life;
- in monitoring health status to ensure that early warning signals can be detected and treatment provided more flexibly than at present;
- in providing accessible communications opportunities for older people to keep in touch with family and friends and ensuring that virtual social cohesion is enhanced; and
- in enabling older people to have greater access to information and advice to assist day-to-day and longer-term living.

The challenges for technology are to act as a bridge between people and communities, and to draw people out of social and physical isolation. To a certain extent older people already take technology for granted, and more older people now use mobile phones, computers and the internet than many commentators realise, but today's 50-somethings will become tomorrows older citizens with a different perspective and familiarity with technology, and may well be the more demanding for it.

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ABOUT THE RESEARCH

'The 'Issues facing older people' study was commissioned by CODEWORKS, and designed, managed and reported by Age Concern Research Services, a division of Age Concern Enterprises Ltd., the commercial arm of Age Concern England.

The survey was conducted on behalf of ACRS by TNS plc through their Omnimas survey. Over 1000 people over 50 in Great Britain were interviewed in home from 18th-30th March 2005.

The research was conducted according to the Code of Conduct of MRS, the professional body for market research in the UK.

Research objectives

CODEWORKS required a programme of research to provide the contextual framework for future research initiatives through the CODEWORKS ATL programme.

The research explored and quantified the views, needs and concerns of older people now, and their perceptions of how this might change, both in general terms (from a society point of view, and from a personal perspective) in the future.

The research attempted to quantify how older people see changes happening over the next twenty years, and to place their views in context with the qualitative input and the views of experts.

Research methodology

The research was conducted in three phases:

1. an exploratory programme of group discussions held with different sections of the older population in three different locations in England;
2. an Expert Panel comprising notable academics with a professional interest in age and ageing issues, from the Institute of Ageing and Health at Newcastle University; and
3. a detailed quantitative study among over 1,000 people over 50 in Great Britain.

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