

EXCLUSION FROM SERVICES IN LATER LIFE

The ROSEnet Services Working Group

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Introduction

In line with the Europe 2020 Strategy (EC 2010), and its objective to guarantee that “people experiencing poverty and social exclusion are enabled to live in dignity and take an active part in society”, there is a strong need for creating a “society for all”, where everyone can realize his or her full potential and pursue a fulfilling life, regardless of age, and based on freely chosen interdependence or autonomy. This means that policies need to be devised for combating social exclusion in later life, embracing older people’s diversity, responding to their varying needs and avoiding older adults being pushed to the margins of our society.

Undoubtedly, equitable access to quality services plays an integral part in any endeavor for social inclusion. Based on a human-based and holistic approach, ageing should be mainstreamed in all areas of services provided by society. In this regard, all existing services should be adapted, and new services developed, in order to guarantee the inclusion of older populations. Special attention should be given to: a) older people with specific or high needs, such as those individuals requiring protection against violence; b) older people in need of support in decision making; c) older persons in early phases of old age, and/or those where needs are just emerging; d) older people at risk of isolation; e) older people in marginal locations and rural areas; and f) those at risk of financial exclusion due to low income/bad debts.

This Briefing Paper offers an overview of state-of-the-art research, and explores policy challenges and considerations related to services across health, transport and information and communication technologies (ICT) to address service exclusion amongst diverse older populations. This Briefing Paper emphasizes the need for, in addition to specific measures, for an ‘older adult service impact assessment’ – an assessment that should be mainstreamed in the development of services likely to be used also by older persons. In this Briefing Paper, **exclusion from services is understood as arising from inequities in relation to the access, usage or appropriateness of service infrastructure for older people, and/or the exclusion of older people from decision making in relation to the design and implementation of services related to their needs and preferences.**

This Brief is structured into three main sections in accordance with the primary service domains relevant to older people. First, exclusion from care services will be considered. This will be followed by a focus on transportation services, and information and communication technology (ICT)-based services. In each section current research evidence will be reviewed, and the main policy challenges identified. The Brief will end with a presentation of key messages for policy on exclusion from services in later life.

For pragmatic purposes, this Brief could not address all dimensions that are important to gain a comprehensive understanding of old-age services exclusion, and how to tackle it. Two of these dimensions deserve a short reference here.

The first concerns touristic services, which are playing a growing role in the dynamics and policies of inclusion/exclusion in times of population ageing (Sedgley et al, 2012): more and more older people contribute to international and domestic tourist flows. While tourism can mitigate the gradual loss of socialization networks resulting from advancing age and changes in the personal and professional

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

Walsh, Scharf & Keating, 2017, p.93

dimensions of later life, participation in tourism still requires several pre-conditions - financial, social, spatial and motivational - that can act as factors of age-based social exclusion and marginalization (Morgan, Pritchard & Sedgley, 2015). Future research should therefore aim at identifying key factors to ensure inclusion of tourism services - from the macro level of public policies to the micro level of proximity services.

The second dimension concerns the field of area-based services. Generally, access to services should be equal, regardless of where a person lives. In reality, people in more remote areas are often excluded from using some services, especially where they do not have access to a private car or rely on significant others to support their transportation needs (Stoeckel and Litwin 2015). Older women often tend to be more affected than older men, and those with lower socio-economic status are also generally more susceptible to this form of exclusion. While not to the same extent, similar patterns of intersecting spatial and service exclusion can be evident for older people living in urban deprived contexts. Policy-oriented research focusing on measures to address old-age area-based exclusion is lacking, especially with regard to how to develop viable community-based strategies and collaborative partnerships between private and public stakeholders. Future efforts should therefore aim at identifying and implementing participatory tools (Warburton et al 2014), to enhance existing networks in civil society and adapt public policies to coexist, since solutions must be developed locally, even if policies are set according to national standards.

Old-age exclusion from care services

When addressing exclusion from care services in later life, it is important to consider how older people are prevented from using the services they need to meet their care needs and promote their well-being. In other words, there has to be a focus on un-met needs, where there is a gap between the expressed demand for care and the level and accessibility of care services provided.

Un-met care needs can have significant negative consequences for older people, such as poorer health, lower levels of health-related quality of life or even an inability to live independently and in dignity. When people's health and care concerns are not addressed early on, their needs may escalate in complexity and prevalence, requiring more intensive care packages. This is costly for older people themselves, for service providers and for society - particularly where care is state funded or subsidized. Furthermore, delays or failing to address people's needs prevents people from contributing fully to society, whether this is providing childcare, doing voluntary work, or continuing in employment. Reliance on alternative care provision through informal carers may also have negative consequences for the informal carer, including economic and health consequences, perpetuating the cycle of social exclusion (Schulz & Sherwood, 2008).

The impact of un-met need for services may differ for different groups. Health status, socio-economic situation, sexual preference, religion or culture, living in a rural or urban area, and family circumstances may create differences in how people experience becoming older and how they can respond to un-met needs. Poorer older people may be unable to buy services on the private market or on the grey market (Hrast, Hlebec & Kavčič, 2012). People in rural areas may face difficulties in accessing services because of a lack of available care services in their localities, higher costs of services because of large distances between service providers and service users, and poor transport infrastructure (Walsh & Ward, 2013). People with limited education opportunities may experience difficulties in accessing information on service availability and entitlement, reducing their level of care service utilization. People who do not marry, or those who live in more socially isolated circumstances, have fewer opportunities to avail of informal supports (Rook & Charles, 2017).

Currently, there are critical knowledge gaps relating to how macro level factors, such as social policy and the way formal services are provided, influence micro level differences in how older people experience care services. There is evidence of large, within-European country differences as well as of significant cross-European country variation in care service provision. However, many European welfare systems now operate based upon a mixed economy of care, characterised by an application of market principles and

using both profit and not for profit providers to deliver state contracted care services. Shortages of paid care labour, increasing female labour market participation, and a widespread contemporary perception that social care is 'in crisis', point to the need for large scale comparative research studies, investigating factors that promote sustainable care systems that can meet the needs of a diverse older population, and a diverse group of carers across Europe.

Policy challenges and considerations

What are the major challenges related to care services that policy makers face? First, implementing a 'one size fits all' approach will not meet the needs of the older population, given its diversity. Second, European countries and regions are confronted with widespread shortages in the care workforce, so the lack of highly qualified professionals on the labour market to provide the services needed in an ageing population, requires clear policy measures. Third, those not accessing services can be hard to reach, with the potential for a lack of awareness amongst isolated older adults as to the services available, and a lack of awareness amongst service providers as to who most requires help and assistance. In this regard, there is a risk that people who could benefit from early service intervention (e.g. prevention or rehabilitation) will not access services until they need a more intensive and costly care package (Canvin, MacLeod, Windle & Sacker, 2018). The challenge here is how to bridge this gap by means of concrete policy measures.

Active ageing policies encourage healthy lifestyles and age-friendly environments with the aim of preventing needs occurring. However, the onus to implement such policies often falls on individuals and communities, leading to widespread variation in how they are realised. Whilst the need to improve service provision is often acknowledged, recent financial crises, coupled with widespread welfare reforms across Europe and globally, have constrained the resources of individuals, civil society organisations, local communities and states, affecting service provision, accessibility, and development.

Given these policy challenges, what are some of the necessary policy considerations?

Increase the capacity, and the recognition of the value, of the care workforce: There is a need to develop the care workforce through improved training and operational supports that includes the effective use of technology. Staff delivering personal care often receive comparatively low wages for work that can be physically and emotionally demanding. Those delivering care deserve sufficient support, and initiatives should be taken to strengthen the care workforce, for example through staff incentives (e.g. wage increases or workplace benefits).

Provide good support and training for informal carers: Unpaid carers provide valuable care that often fills gaps in formal services. However, their immense efforts are frequently overlooked. The care contribution of informal carers should be recognised and valued, not only by individuals in the family or immediate environment of the informal carers and care receivers, but also by society (for example through pension credits where the caring role prevents employment). Informal carers' needs should be assessed and measures should be taken to support them and reduce negative impacts of caring activities on their personal physical or mental health. In addition, measures should be undertaken to extend employment rights for informal carers, enabling the combination of work in paid employment and informal care provision. This is an urgent measure, as many give up work or reduce their working hours at some point due to caring responsibilities (Carers UK, 2019), resulting in a higher risk of poverty for this group. Good provision of training opportunities for this group needs to be developed, to ensure that the care given directly reflects older people's care needs. Improving support measures for informal carers would not only strengthen the motivation for informal care, but also increase the capacity of formal care services to concentrate on those older people with higher care needs but fewer social and informal support resources. The overall aim should be to make informal care a chosen option for care givers and recipients, and not a "trap" due to the lack of viable alternatives.

Information about available care services should be widely accessible: Organisations offering care services should be encouraged to ensure that information is distributed in a variety of forms, and not just

online. For example, in the European Union, the proportion of older adults using the internet for accessing different services on-line lags behind the rest of the population (Eurostat 2015). This societal dynamic means that the oldest age groups are particularly at risk of being excluded from essential service information. Special attention should also be given to the use of accessible and non-technical language.

Old-age exclusion from transportation services

Old-age exclusion in the field of transportation services can be either related to transport accessibility (e.g. an inability to access the transport services due to high costs, physical barriers or lack of actual service provision), or exclusion from society due to the lack of transport (e.g. an inability to reach services or outlets for social participation due to the lack of transport) (Shergold, Parkhurst and Musselwhite, 2012).

Exclusion from society has negative consequences both for older adults themselves, but also for society, as it prevents a growing segment of the population from contributing to the overall community's welfare and economy (Anderson et al, 2013). Transport is an important factor facilitating inclusion and should be considered as a part of social structures that facilitate good ageing and quality of life (Johnson, Currie and Stanley, 2011; Siren and Haustein, 2013). At a more fundamental level, accessibility issues are important because they are the first step to consider in securing entry to transport services.

As with care services, addressing transport issues through a 'one-size-fits-all' approach should be avoided, with different groups encountering different sets of challenges. These challenges can vary by urban-rural location (Parkhurst et al., 2014), but also in accordance with individual resources and characteristics (e.g. age, income, physical ability, social network, family status). Local and national policies, such as policies on driver licensing in old age - including those addressing the needs of those who have stopped driving (Mezuk and Rebok 2008) - are also influential with differential impacts evident across jurisdictions.

A great deal of research exists on transport planning and design for older adults (Nordbakke and Schwanen, 2015). We know a lot about accessibility and decreased physical functioning, and the different needs of different user groups (Audirac, 2008). However, much less is known about how policies influence transport-related exclusion (Siren and Gasparovic, 2017). There is also a lack of critical analysis of age-related implications of different policies regulating transport and mobility, for instance also with regard to the future role of the recently developed Connected Autonomous Vehicles (Shergold, Wilson and Parkhurst 2016).

Policy challenges and considerations

A major policy challenge is to really understand the needs of older adults and to avoid assuming what those needs, or older people's preferences, might be. Like the older population, these needs are heterogeneous, and determined by social and demographic factors. Consequently, without sound empirical evidence it is difficult to cater for the range of need. Too often, however, there is little attempt to understand the needs, and instead there is a tendency to guess what older people require or what they would prefer. In this regard, it would also be crucial to consider the sustainability of funding scalable transport solutions, or of designing transport platforms that incorporate and account for mixed modes of provision and mobility.

Another important policy challenge is to deal with conflicting goals. For example, supporting older persons' mobility may conflict with goals for greener transport or goals for traffic safety. There is research evidence about the importance of mobility for older persons' well-being. Several studies have investigated these needs more closely and given input to policymaking. However, policies are always political and these goals for a good transport system necessarily compete with other, sometimes conflicting goals. Therefore, priorities should be set and political choices should be made in such a way that older people's transportation needs are properly considered when implementing measures cutting across different societal groups.

Given these policy challenges, what are some of the necessary policy considerations?

Driver licensing based on capability and not chronological age: One of the most problematic policies regulating older persons' mobility and ability to use transport systems are the age-related restrictions on driver licenses. These policies are demonstrably harmful for older people and have not been found to produce any positive effects in terms of safety. The insurance is costly for people in older age groups – in most countries identified by those aged 75 years old or over – who want to rent a car. However, the access to services at all ages is not (yet) a European directive, so these age-based restrictions should be removed, when they prove to be ineffective.

Developing alternative transport assessment and impact frameworks: There is a need to move away from silo-based thinking, and consider how regulating/policing older people's transport and mobility has an impact at an holistic level. This means that a comprehensive conceptual approach should be adopted, which does not take into account only transportation and closely related areas, but also the lives of older people, and society as a whole.

Implementation of inclusive design and co-production transport development strategies: The spatial planning of transport services based on universal design principles is a key factor in reducing old-age social exclusion, as this would enhance accessibility to transportation by considering it as a continuum measure. This requires the development of a better conceptual understanding of how transport planning policies impact on social exclusion, by thinking outside the traditional boundaries of planning, thus going beyond the use of traditional tools - based for instance on population density or physical design only. Instead, we need to aim at interconnecting different dimensions in formulating a transport plan, such as physical mobility, urban design and socio-economic characteristics of the target group population.

Old-age exclusion from ICT-based services

Older people can experience challenges in accessing technology-based services in contemporary and evolving digital societies. In general terms, older people are more likely to have less awareness, skills and less of the socio-economic resources required for accessing and using information and communication technologies (ICTs) and, more specifically, digital services. In this sense, old-age exclusion and ICT can be seen from different perspectives. First, as a result of exclusion, older people may experience risk factors limiting their access to and the benefits of using digital services. Second, in terms of cause, intrinsic characteristics of digital services may constitute in themselves a barrier to older people using on-line infrastructure and accessing on-line services. Finally, digital services may be a way to overcome social exclusion from traditional services.

Paying attention to old-age exclusion from ICT-based services is important as we are living in a world under comprehensive digitalisation which is producing major social changes in contemporary societies. Services, behaviours and lifestyles are deeply influenced by the availability and use of these technologies in every sphere of individuals' lives, such as for instance interpersonal communication, commerce, education, healthcare and public services. However, the transition from traditional to progressively digitised services may lead to new forms of social exclusion for some social groups and individuals, who may have less digital skills, resources, interest or willingness to use digitised services (Helsper & Reisdorf 2016; Olsson et al. 2017).

Since older people are a heterogeneous population with different characteristics, needs and preferences, exclusion in this field has various meanings. For some older people, e.g. those who received limited education and socio-economic resources and people living with a disability, digital services may easily represent a barrier for obtaining and benefitting from the services they want and need (Gell et al. 2015; Yoon et al. 2018). However, if weaknesses of digital services for these groups are addressed (e.g. difficulty of use), they can constitute a way to overcome usual barriers of traditional services and to reach underserved and deprived areas where no/few face-to-face services exist (as in the case of digital health services: e.g.

Barbabella et al. 2017). Furthermore, some groups of older people may be more equipped for accessing and using digital services because they benefited from the accumulation of significant opportunities throughout their lives (e.g. people with higher levels of wealth, education and interest in technology), and thus in principle can benefit the most (König et al. 2018). Nevertheless, it cannot be taken for granted that older people may have enough trust, motivation or understanding of the potential added value of ICTs. Attitudes and previous experience with technologies are also relevant factors linked to the use of digital services (Siren & Knudsen 2017).

Research offers evidence for the fact that old-age exclusion in the field of ICT- and technology-based services is not based on a single pattern. Social mechanisms leading to exclusion are different and rely on four types of factors and their combinations: (1) human, social and economic resources of older people, i.e. their actual capacity to access, use and benefit fully from digital services (Helsper & Reisdorf 2016; Olsson et al. 2017); (2) awareness, interest and willingness of older people to use digital services, i.e. their agency, behavioural intentions and active ageing styles (Siren & Knudsen 2017); (3) the design of ICTs and technologies in general, which may intrinsically facilitate or limit use by older people (Fisk et al. 2009); (4) the expected benefits and the comparison with traditional services, i.e. considerations of whether technologies are actually beneficial or even more efficient compared to traditional variations (Francis et al. 2018; Schultz et al. 2015).

Yet despite the existing and emerging knowledge in this area, research remains fragmented and lacks a harmonised and coherent scientific discourse specifically around social exclusion and digital services in old age. Key gaps concern the need for new evidence on social mechanisms and behavioural intentions of current and future groups of older people, leading to exclusion, individual preferences and usage patterns, and changes across cohorts (Centre for Ageing Better 2018). Furthermore there is a need to enhance our study of the potential of new cutting-edge technologies (e.g. artificial intelligence) to support quality of life and independent living. Moreover, the increasing involvement of older people in digital and virtual social communities might lead towards new social behaviours and better active ageing, creative attitudes and psychological well-being. However, with little work in this area, such patterns need to be investigated more comprehensively (Hutto et al. 2015). Another important aspect is that many digitized service interfaces are mostly designed with a 'healthy' person (user) in mind. A growing concern represents the systematic exclusion of some groups of older people, typically the most disadvantaged ones, from the research conducted within the field of ICT- and technology-based services. The oldest old, those with lower educational attainment, women, those with low digital skills and low-levels of familiarity with new technologies are more likely to be underrepresented in this kind of research, and hence their needs are less likely to be acknowledged and addressed (Fisk et al. 2009). This might, on the one hand, lead to biased research results and selective implementations of future innovative services, and, on the other hand, exacerbate the exclusion of disadvantaged groups of older people from new ICT- and technology-based services (Helsper & Reisdorf 2016).

Policy challenges and considerations

At a policy level, the innovation led by the progressive increasing of available digital services has been fostered mostly by the private sector, although public actors have been stimulating this process in different ways. These investments have led to major revolutions in the last two decades in terms of telecommunications, web-based services, mobile applications, telemedicine, e-commerce, e-learning, and many other fields. However, the transition towards mature electronic public services (e-government) and the technology-related empowerment of (older) citizens still requires major efforts by policy makers to fill in the gap and support comprehensive and inclusive digital societies. Even with such a rapid spread of progressively newer technologies, the affordability of devices remains on a stable curve and limits the penetration rates in the poorest European countries and regions. Furthermore, the European Commission has proposed measures for exploiting digital transformation of health and social care services for ageing well, yet neglecting or focusing less on other areas. Other initiatives since the e-Inclusion Riga declaration in

2006¹ encourage social inclusion in digital societies through development of accessible services. Yet, the accessibility standards still remain outdated in many cases and not binding for member states.

The transition towards more evolved digital and inclusive societies has been a key objective in most European countries. One of the best practices in this field comes from Estonia, with the e-Estonia initiative (<https://e-estonia.com>). This has led to an impressive, rapid advancement in ICT application across the Baltic country in the development and implementation of electronic (public and private) services. However, most states have had so far a less comprehensive approach, with fewer investments, leading to minor advances and success. Furthermore, most governmental solutions for information and education are web-based and might constitute an obstacle for people with age-related conditions (e.g. visual impairment) if such services are not offered in any other way.

Given these policy challenges, what are some of the necessary policy considerations?

Dedicated ageing and technology strategies: older people are a heterogeneous social group who need dedicated strategies for addressing their needs and preferences for accessing and using daily life services. ICTs and technologies can enable better and wider services, but more investment is required for enhancing awareness, empowerment and impact among older people. This is especially in relation to the increased exposure to digital threats, including for instance the recognition of unreliable information on-line (e.g. fake news) and cybercrimes (e.g. e-fraud cases).

Need to assess the intersection between ICT and age-related exclusion: old-age exclusion in the field of ICT- and technology-based services is not well understood across different social groups, within or between countries. More efforts should be made to assess in-depth the different patterns of social exclusion, and its roots and mechanisms within the current framework of technology, welfare and active ageing policies. This is also necessary in relation to ageing well at home and, at the same time, to be included in society through digital services and communities.

¹ http://ec.europa.eu/information_society/activities/ict_psp/documents/declaration_riga.pdf

Key Messages

Based on the analysis contained within this Briefing Paper, we propose the following messages for policy makers:

1. Do not consider older people as a homogeneous group, in relation to service needs, access and use, and service design and implementation.
2. Develop an impact assessment tool (or framework) that would assist in the design and evaluation of services for older persons.
3. While acknowledging the fundamental role of informal care, policies in this area should give priority to the development of more professionalized care jobs in the labour market, with decent job contracts and decent payment.
4. Full recognition should be given to the challenges existing in informal care provision, with the need to shift away from considering this form of provision as a source of cheap labour, and to avoid informal carers becoming vulnerable to financial, social and health problems.
5. Information about available care services should be widely accessible, in a variety of forms, not just online, in understandable and non-technical language.
6. Provide good transport links and accessibility infrastructures, particularly to and from service facilities centres, via flexible multi-modal transport systems that address older people's diversity of connectivity preferences and physical mobility needs.
7. Assess the impact of age-related restrictions on driver licensing and insurances, with a view to moving from a chronological age approach to a capabilities-based approach.
8. ICTs and technologies require more investment to enhance awareness, empowerment and impact of these technologies among older people.
9. Further consideration is required at a policy level of the role of ICT- and technology-based services in mediating exclusionary outcomes. Further efforts are required to assess this role within the current framework of technology, welfare and active ageing policies.

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

Research Objectives

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

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