

<b>Institution:</b> University of Southampton
<b>Unit of Assessment:</b> 22 Social Work and Social Policy
<b>Title of case study:</b> 22-04 Ageing, Intergenerational Relations and the Life Course
<p><b>1. Summary of the impact</b></p> <p>Research by the University of Southampton into ageing, intergenerational relations and the life course has influenced policy debate and practice at national and international levels, highlighting the importance of adapting social policy to take account of the changing shape of the life course. Empirical research evidencing the impact of earlier life course events on women's resources in later life informed the UN Committee on the Elimination of Discrimination against Women. Other research has informed the policy work of the European Commission, the UN Economic Commission for Europe and national and local governments, potentially affecting the lives of millions of people.</p>
<p><b>2. Underpinning research</b></p> <p>Ageing, and its impact on individuals and society, is a key issue for social and policy agendas. Increasing longevity, changes in patterns of family formation, family dissolution and labour force participation are altering the shape of the life course. This has implications for all areas of social policy, but especially those concerned with promoting work-life balance and supporting family care. Jane Falkingham, Professor of Demography &amp; International Social Policy (since 2002) and Director of the Economic and Social Research Council (ESRC) Centre for Population Change (CPC) (since 2009), and Maria Evandrou, Professor of Gerontology and founding Director of the Centre for Research on Ageing (CRA) (since 2005), and their teams at the University of Southampton have conducted research towards improving our understanding of the social policy implications of population ageing in the UK and internationally. In particular, this research has evidenced a) the importance of the life course in determining outcomes in later life and b) the pressing need to adapt social policy to the changes in the life course that are taking place across cohorts. The team's research has also focussed attention on the need to take into account gender differences in the life course and their associated inequalities.</p> <p>In two linked papers, published in the Journal of Social Policy <b>[3.1]</b> and the Journal of European Social Policy <b>[3.2]</b>, Evandrou and Falkingham, with their co-authors Tom Sefton (Research Fellow employed on the Nuffield Foundation grant 2005-2007 <b>[G1]</b>; now working outside academia) and Athina Vlachantoni (Senior Lecturer in Gerontology, University of Southampton), provided empirical evidence of the relationship between the family and work histories of older women and their personal incomes in later life, in the UK, Germany and Sweden. Comparison of three countries with different welfare regimes and pension systems facilitated improved understanding of the interaction between the life course, pension system and women's incomes in later life. The research also highlighted the trade-offs in policy design between two objectives: rewarding work, and protecting the most vulnerable, such as carers, long-term disabled and unemployed.</p> <p>A body of work by Evandrou and Falkingham over the last decade has investigated changes in the demographic and socio-economic experiences across cohorts, drawing attention to the fact that the characteristics and needs of tomorrow's elders were likely to be very different to those of today's older population. For example, empirical analysis underlined the significant diversity amongst the 1960s baby boomers in terms of their patterns of family formation and dissolution, alerting policy planners to a likely 'informal care gap' <b>[3.3, G2]</b>.</p> <p>From 2010 this line of enquiry was extended to investigate patterns of living arrangements across the life course. Research on changes in the living arrangements of young men and women over the past 20 years highlighted the role that social policies play in influencing the ability of young adults' to maintain residential independence <b>[3.4]</b>. The research team also explored the under-researched phase of mid-life using data from the General Household Survey (1984-2007) and the British Household Panel Survey to demonstrate that living alone in mid-life is on the rise, with implications for care networks in later life <b>[3.5, 3.6, G3]</b>.</p>

### 3. References to the research

- 3.1 Sefton, T., Evandrou, M. and Falkingham, J. (2011) Family Ties: Women's Work and Family Histories and their Association with Incomes in Later Life in the UK. *Journal of Social Policy*, 40(1): 41-69.
- 3.2 Sefton, T., Evandrou, M., Falkingham, J. and Vlachantoni, A. (2011) The relationship between women's work histories and incomes in later life in the UK, US and West Germany. *Journal of European Social Policy*, 21, (1), 20-36.
- 3.3 Evandrou, M. and Falkingham, J. (2006) Will the baby-boomers be better off than their parents in retirement? In, Vincent, J.A., Phillipson, C.R. and Downs, M. (eds.) *The Futures of Old Age*. London, Sage Publications, 90-102.
- 3.4 Stone, J., Berrington, A. and Falkingham, J. (2011), 'The changing determinants of UK young adults' living arrangements', *Demographic Research*, 25: 629-666.
- 3.5 Demey, D. Berrington, A. Evandrou, M. and Falkingham, J. (2011) 'The changing demography of mid-life, from the 1980s to the 2000s' *Population Trends* 145: 16-34.
- 3.6 Demey, D., Berrington, A., Evandrou, M. and Falkingham, J. (2013) 'Pathways into living alone in mid-life: Diversity and policy implications'. *Advances in Life Course Research*, 18(3):161-174.

### Grants

- G1. Evandrou (PI), Falkingham, Johnson, and Rake Lifetime events and the incomes of the older population in the British, German, Swedish and American welfare states. Nuffield Foundation, 2004-2007, £152,308. (Awarded whilst Evandrou was at Kings College London, but partially moved to Southampton when she took up her appointment in mid-2005).
- G2. Falkingham (PI), Evandrou, Johnson, Rake, ESRC Research Group: Simulating Social Policy for an Ageing Society, 11/1999-10/2005, £755,000 (FEC). (Awarded whilst Falkingham was at London School of Economics, but partially moved to Southampton when she took up her appointment in September 2002).
- G3. Falkingham (PI), Evandrou, Boyle and Heath. Centre for Population Change, ESRC, 2009-2013, £6,497,344 FEC.

### 4. Details of the impact

As a direct result of their research, members of CPC and CRA have engaged with leading international, national and local policymakers throughout the impact assessment period, with their research findings influencing policy debate and informing policy design at all levels.

In summer of 2009, Evandrou and Falkingham's research (ref [3.1], then available as a working paper) was selected by Elizabeth Sclater, an advisor to the UK Equality and Human Rights Commission, for submission as evidence to the UN Committee on the Elimination of Discrimination against Women (CEDAW) and "provided valuable reference material" [5.1] towards the development of the General Recommendation No. 27 on Older Women [5.2].

This research, showing that the individual's employment history affects income in later life, and that lower retirement income was linked with fewer years of employment history, was also cited by the Australian Government's key research body in the area of family wellbeing, the Australian Institute of Family Studies (AIFS), in their 2012 report on 'Ageing parent carers of people with a disability' (5.3), and was used to argue the need for a carers pension for Australia's 490,000 carers providing unpaid assistance to others with a severe or profound level of disability.

In 2009, CPC was a partner in a successful bid to the European Commission to establish a knowledge exchange platform to promote understanding of demographic change in Europe [5.4]. Since then, members of CPC have actively participated in a series of public engagement events organised by *Population Europe* (a network of leading European research centres supported by

## Impact case study (REF3b)

the European Commission) giving presentations at meetings between influential decision-makers and eminent scholars [5.5]. For example, in October 2010 Falkingham gave a keynote address at a closed meeting for members of the European Parliament, the Chair of the European Economic and Social Committee and the Head of Social and Demographic Analysis for the Directorate-General (DG) for Employment, Social Affairs and Inclusion. This led in January 2011 to the 'Population & Policy Compact' *Europe's Citizens should have a Choice: Toward a New Policy of Life-Course Flexibility* [5.6] co-authored by Falkingham and advocating the adoption of policies to support more flexible work and better work-life balance. This was supplemented in September 2011 with the 'Demographic Insights' paper *Working Life & Retirement* - a short briefing for the media based on an interview with Jane Falkingham [5.6]. In May 2012, Falkingham gave the opening address at a Population Europe Conference held at the Presidential Palace, Warsaw, attended by the President and the Polish Minister of Social Protection [5.5]. Funding for Population Europe from the EC has since been renewed, with Jane Falkingham forming part of the four person bid drafting team (along with French, Dutch and German colleagues) for both grants.

The weight of the impact of CPC's ongoing research in informing policy debate at the European level is corroborated by Ettore Marchetti, of the DG for Employment:

*'Jane's team has helped us highlight the importance of adapting social policy to take account of recent demographic changes, particularly the changing shape of the life course across cohorts as well as gender inequalities. This type of research is important in supporting the European Commission, the Member States as well as their social partners meet the challenge of an ageing population and promoting solidarity between generations.'* [5.7]

In September 2012, Falkingham was invited to give a keynote address at the Researcher Forum, UN Economic Commission for Europe Conference on Ageing, Vienna. A subsequent e-mail from Alexandre Sidorenko, former head of UN Ageing programme and conference organiser, said:

*'... the Centre for Research on Ageing has provided valuable insights into the changing shape of the life course and the critical role played by both the family and social policy in ensuring quality of life in old age. Prof Falkingham's recent keynote address ... highlighted the importance of social policy adapting to a changing life course and the necessity of designing social policy that delivers across the life course. Her recommendations were reflected in the subsequent Research Forum's Statement presented during the Ministerial Conference.'* [5.8]

Since 2009, members of CPC have undertaken a range of public engagement activities to influence policy thinking nationally. In November 2012 research on changes in the living arrangements of young men and women, highlighting the role that social policies play in influencing the ability of young adults to maintain residential independence [3.4], was presented to a policy audience of key stakeholders at grassroots, local and national government levels at the Local Government Association [5.9]. The research was widely reported in the national media and on twitter, as was the research on mid-life [5.10]. Subsequently Falkingham has made CPC/CRA research insights on demographic changes accessible to the public through regular media contributions including 'More or Less' (broadcast on Radio 4 and the World Service) Radio 4's *The World Tonight* and BBC and Channel 4 News. *The research has also been quoted in The Guardian, The Independent, The Daily Telegraph and BBC News websites* [5.10].

By directly engaging with international, national and local policy makers, practitioners, members of the UoA have ensured that CPC and CRA research has achieved significant reach and has informed and shaped policy discussion and debate at all levels.

## 5. Sources to corroborate the impact

- 5.1 Email extracts from Executive Officer, Older Women's Network (OWN) and advisor to the UK Equality and Human Rights Commission, 15 July 2009 and 18 August 2013. (full text of emails available upon request)

*"I would be grateful if you would pass on to Maria Evandrou et al that their very timely-published paper on women's work histories and income in later life has been sent to the Committee... The paper will provide valuable reference material and will be valued by the Chair of the working group, Ferdous Ara Begum" (email correspondence, 15 July 2009).*

*"... Ferdous Ara Begum was much appreciative of all the material she was sent. It enabled her to demonstrate to her colleagues the direct impact of the cumulative effect on older women's lives of the discriminatory practices in this area over the life course ... for those of us lobbying at the UN and monitoring government implementation, case histories and data are powerful tools" (extract from email correspondence, 18 August 2013).*

- 5.2** Committee on the Elimination of Discrimination against Women - General recommendation No 27 - adopted on 28 June 2010 <http://daccess-dds-ny.un.org/doc/UNDOC/GEN/G10/472/53/PDF/G1047253.pdf?OpenElement>
- 5.3** Lixia Qu, Ben Edwards and Matthew Gray (2012) *Ageing parent carers of people with a disability* Canberra: Australian Institute of Family Studies, ISBN 978-1-921414-92-3 <http://www.aifs.gov.au/institute/pubs/carers/index.html> Output 3.1 (Sefton, Evandrou and Falkingham, 2011) is cited as evidence in section 3.3 of 'Ageing parent carers...'
- 5.4** European Commission, DG Employment, Social Affairs and Equal Opportunities, "Raising Population Awareness and Addressing Demographic and Social Change in Europe" (Acronym: Population Europe), Agreement ref. no. VS/2009/0564, 1.12.2009–30.11.2012, 499,607 Euro. European Commission, DG Employment, Social Affairs and Inclusion, "Promoting Knowledge Exchange and Information Access on Demographic and Societal Change in Europe" (Acronym: Population Europe 2.0), Agreement ref. no. VS/2012/0168, 1.1.2013–31.12.2015. 499,820 Euro.
- 5.5** Agenda and participants list for key Population Europe events with participation from UoA members available on request. See also <http://www.population-europe.eu/Events/Events.aspx> and [https://www.population-europe.eu/files/Report\\_2009-2011.pdf](https://www.population-europe.eu/files/Report_2009-2011.pdf)
- 5.6** Population & Policy Compact 01/2011 *Europe's Citizens should have a Choice: Toward a New Policy of Life-Course Flexibility* <http://www.population-europe.eu/Library/PolicyBrief/2326/en>
- Demographic Insights' 02/2011 *Working Life & Retirement Social policies for changing lives: Five questions to the demographer Jane Falkingham* <http://www.population-europe.eu/Press/DemographicInsights.aspx>
- 5.7** Email from Economic Analyst, DG Employment, European Commission - Unit D1: Social Policy Innovation and Governance European Commission; received 22 May 2013, following EC Fourth Demographic Forum, 6-7 May Brussels. (full text of email available on request)
- 5.8** Email from Senior Adviser, European Centre for Social Welfare Policy and Research, Austria. (full text of email available on request)
- 5.9** 'Young adults' housing and independent living: New insights' 23rd November 2012, Local Government House, Smith Square, London, <http://www.cpc.ac.uk/events/?action=story&id=133>
- 5.10** Media sources: Full file of media coverage of research on changes in the living arrangements of young men and women and in mid-life are available on request.