

Use of local surveys for local policy making

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The meaning of TooLS

TooLS is an informationsystem to understand challenges and chances of the demographic change on the local level.

Components:

- tools, instruments
- information, a knowledge base



Instruments, tools of ToolS

- Kernel: DUVA-System
- Developed and conducted by KOSIS
- Power of DUVA:
 - Retrieval
 - Storage
 - Management
 - analysis
 - Exchange
 - presentation
- Special feature: Metafile-structure



Advancements of DUVA by the TooLS-Project

- develop a fully web based functionality
- use the XML-standard
- create a multilingual user interface
- construct new features and modules for the collection and handling of data
- prepare a multilingual user manual



Type and sources of data

Type of data	1 “Objective” data	2 “Subjective” data
A Available (secondary) data	1 A From other than local sources: Urban Audit a.o.	2 A From other than local sources: Perception Survey a.o.
B Primary data through surveys	1 B Modules of questions for local administrations and service providers	2 B Modules of questions for citizens, especially senior citizens



Selections, concentrations

1. Selection: 9 „pioneer cities“ in 3 countries
 - not fixed number of associated cities
2. Selection: Age group 50+
3. Selection: Two aspects which concern challenges and chances



Topics and structure of the questionnaire for citizen surveys

Question group	Question numbers
<i>1. Employment, employment orientation</i>	1,2
<i>2. Voluntary work</i>	3 – 6
<i>3. Advanced training, interest in advanced training</i>	7,8
<i>4. Health, life satisfaction, well-being</i>	9 – 12
<i>5. Opportunities for social contact</i>	13 – 15
<i>6. Household, way of life</i>	16 – 23
<i>7. Need and infrastructures for long-term care:</i>	24 – 35
<i>8. Milieu rating : status and habitus</i>	36 – 40
<i>9. Socio-demographic data: citizenship, migration background, age, gender</i>	41 - 47



Principles for local citizen surveys

- Standardized questionnaire with a nucleus of items for all countries and cities
- As far as possible: adoption of questions and items from representative european surveys (ESS, Eurobarometer...)
- Possibility to place special items and questions regarding the situation of a city or actual developments
- Replication all two years
- Dependent on resources: Written or face to face interview



Selection of content: CHANCES and CHALLENGES

The general idea: what is „active ageing“ and how is it possible?

CHANCES

- Increasing proportion and number of people in the age groups 50+ who are healthy and fit
 - Extended labour participation?
 - Increasing interest in professional qualification and continuing education?
 - Increasing preparedness for volunteering, for solidarity as civic activity?
- Mobilization and Trend to an „active society“?

CHALLENGES

- Increasing proportion and number of people who are in need of care
- Decreasing possibilities to provide for informal care by the family
 - Informal support networks?
 - preferences and chances for the supply of care
 - Possibilities for a self-determined way of life in this situation?
- Trend to an „overburdened Society“?



Examples for the transformation of survey data into structural properties of countries and cities

1. Set: Chances - active or passive mode of ageing

- Position of countries on an „active-passive-continuum“
- „active-passive-attribute“ and average life satisfaction
- Proposals for explanations

2. Set: Challenges: long term care and solidarity

- Expected number of care needing people and informal care potential
- „care cultures“ in european countries
- Proposals for explanations
- Primary and secondary solidarity

Set 1: Active or passive adaptation to demographic change?

- Basis for indicators: European Social Survey
- Indicators for countries (cities)
 - Labour force participation rate
 - Percent participating in skill enhancement
 - Percent volunteering
- Aggregation to a scale „active-passive-continuum“



1 We would like to know first, what kind of activities you are engaged in. In the last month have you done any paid work? What applies to you? <ESS, E49, changed>

Please tick only one box.

Yes, I am employed full time	<input type="checkbox"/>	Please go to the next question
Yes, I am employed part time	<input type="checkbox"/>	
No, I am unemployed, seeking work	<input type="checkbox"/>	Please go to 3
No, I am retired	<input type="checkbox"/>	
No, I am a homemaker	<input type="checkbox"/>	
No, I am a trainee	<input type="checkbox"/>	

Labour force participation rate

3 In the last month have you done any voluntary work? <ESS, E49>

Yes	<input type="checkbox"/>	Please go to the next question
No	<input type="checkbox"/>	Please go to 5

Percent volunteering

7 During the last twelve months, have you taken any course or attended any lecture or conference to improve your knowledge or skills for work? <ESS, F61>

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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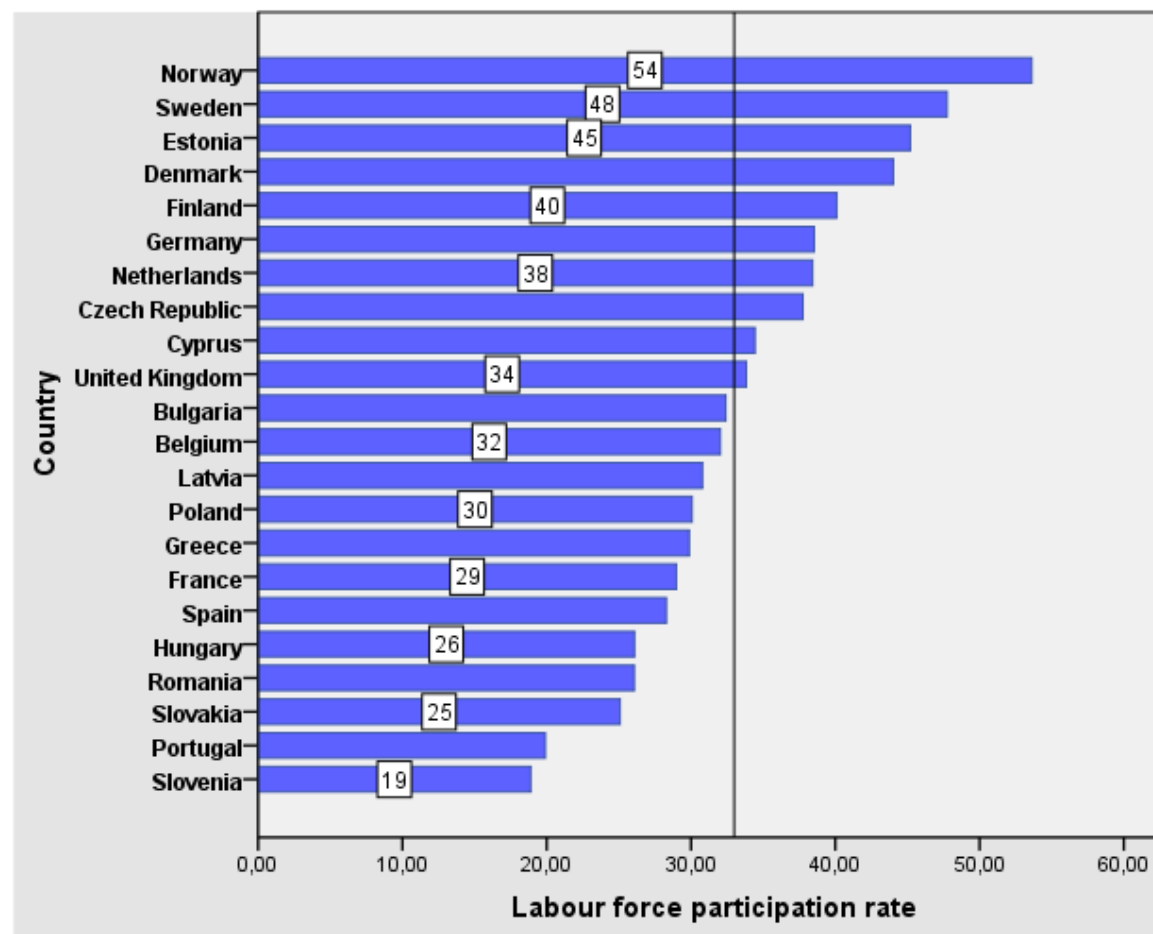
Percent participating in skill enhancement

8 Do you intend to attend any event – i.e. in the next 12 months – that has to do with your professional education and training?

Yes	<input type="checkbox"/>	No	<input type="checkbox"/>
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Labour force participation rate in European countries – age groups 50 +

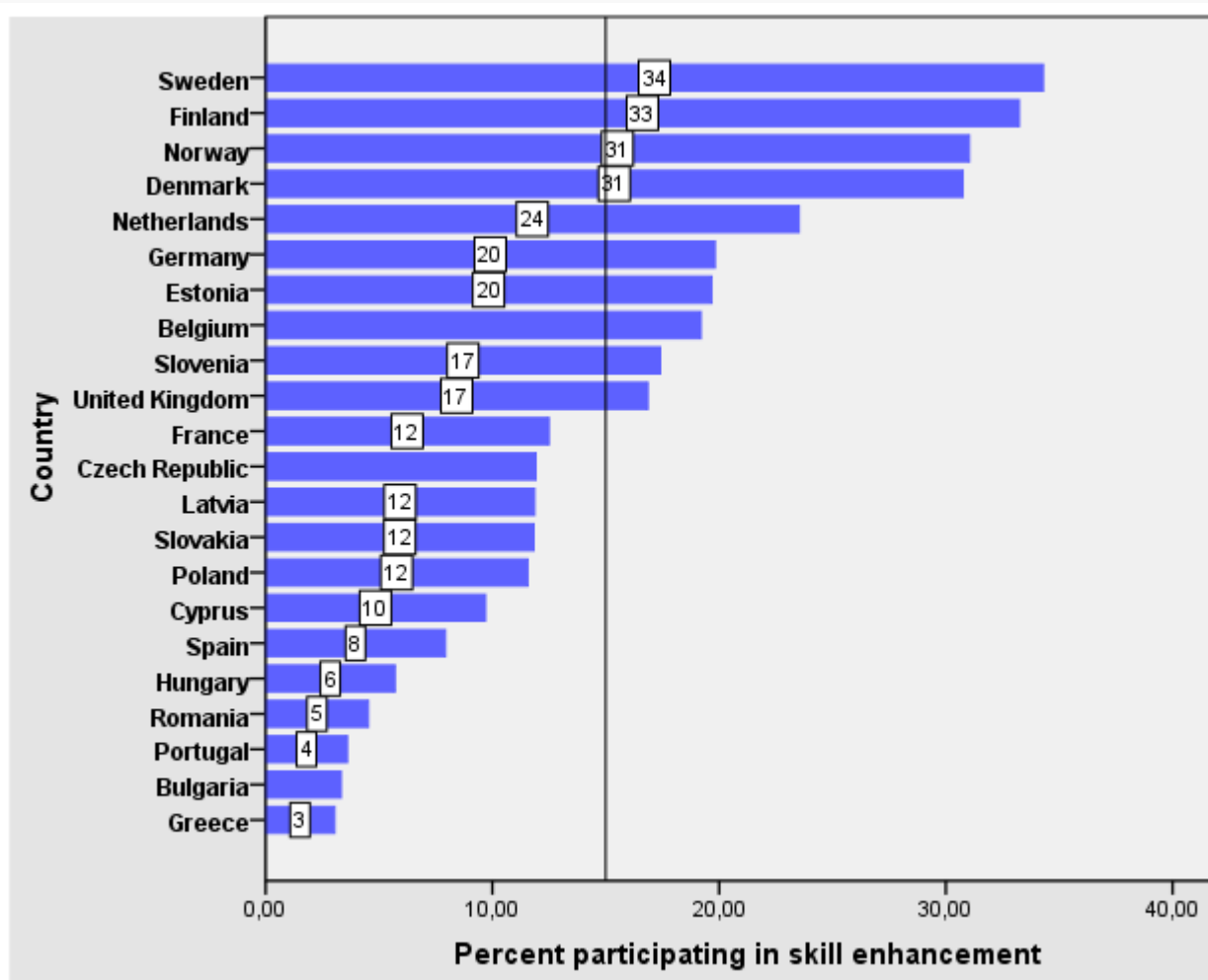


Average: 33 %

Basis: ESS; analysis by FIFAS



Percent participating in skill enhancement in European countries - age groups 50 +

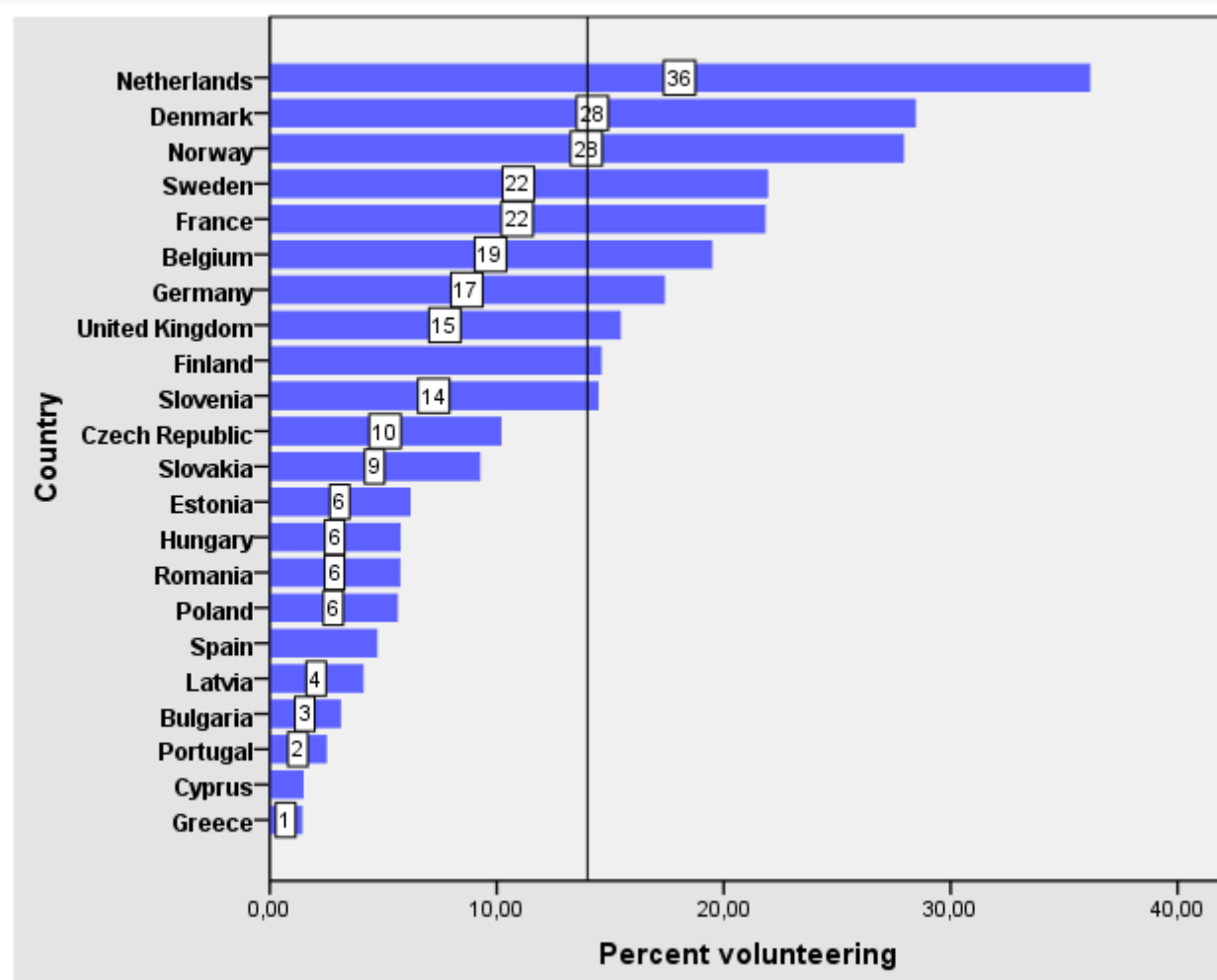


Average: 15 %

Basis: ESS; analysis by FIFAS



Percent volunteering in European countries – age groups 50 +

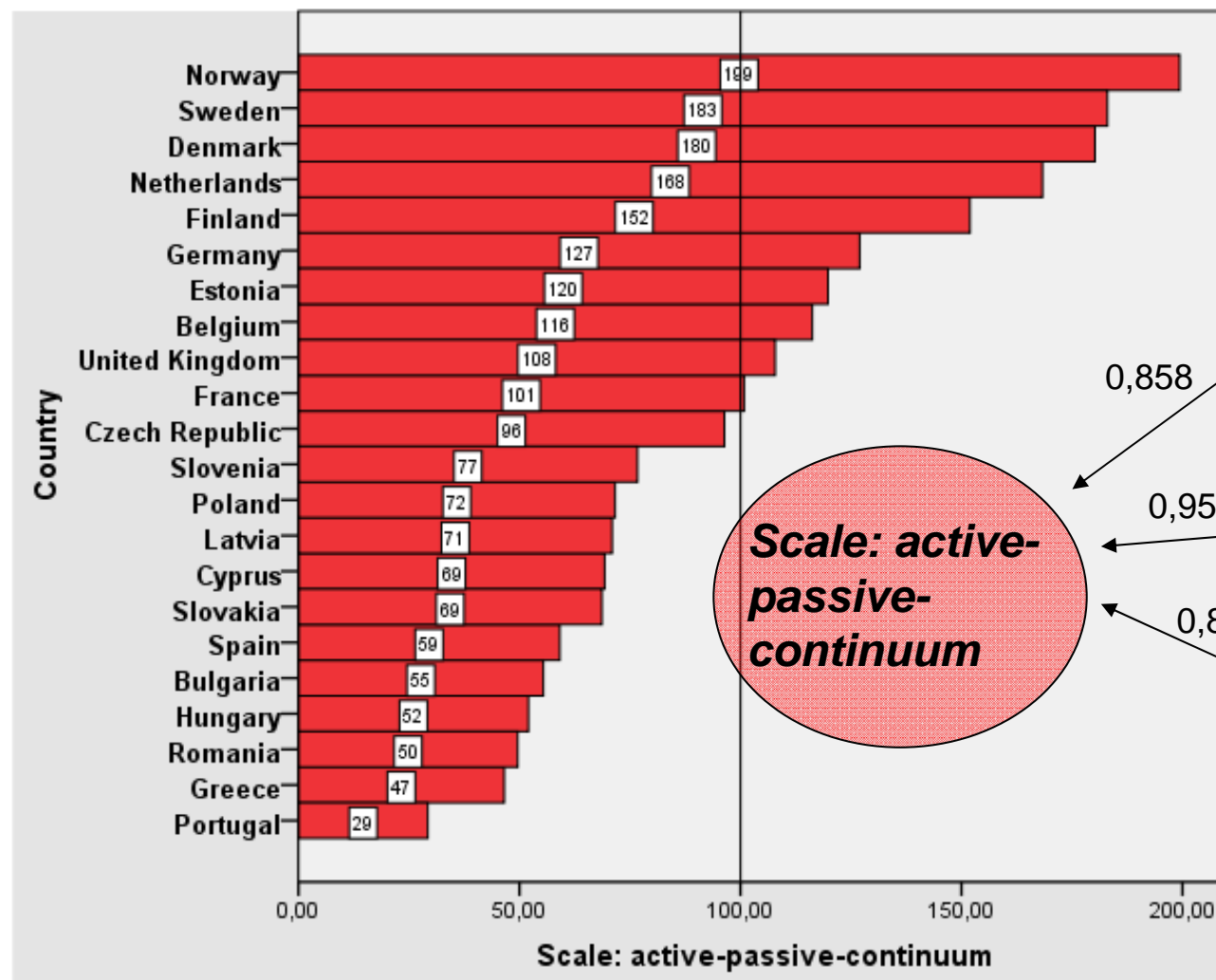


Average: 14 %

Basis: ESS; analysis by FIFAS



Aggregation to a scale: Position of European countries on the „active-passive-continuum“ – age groups 50+



Factor analysis (loadings)

0,858 Labour force participation rate

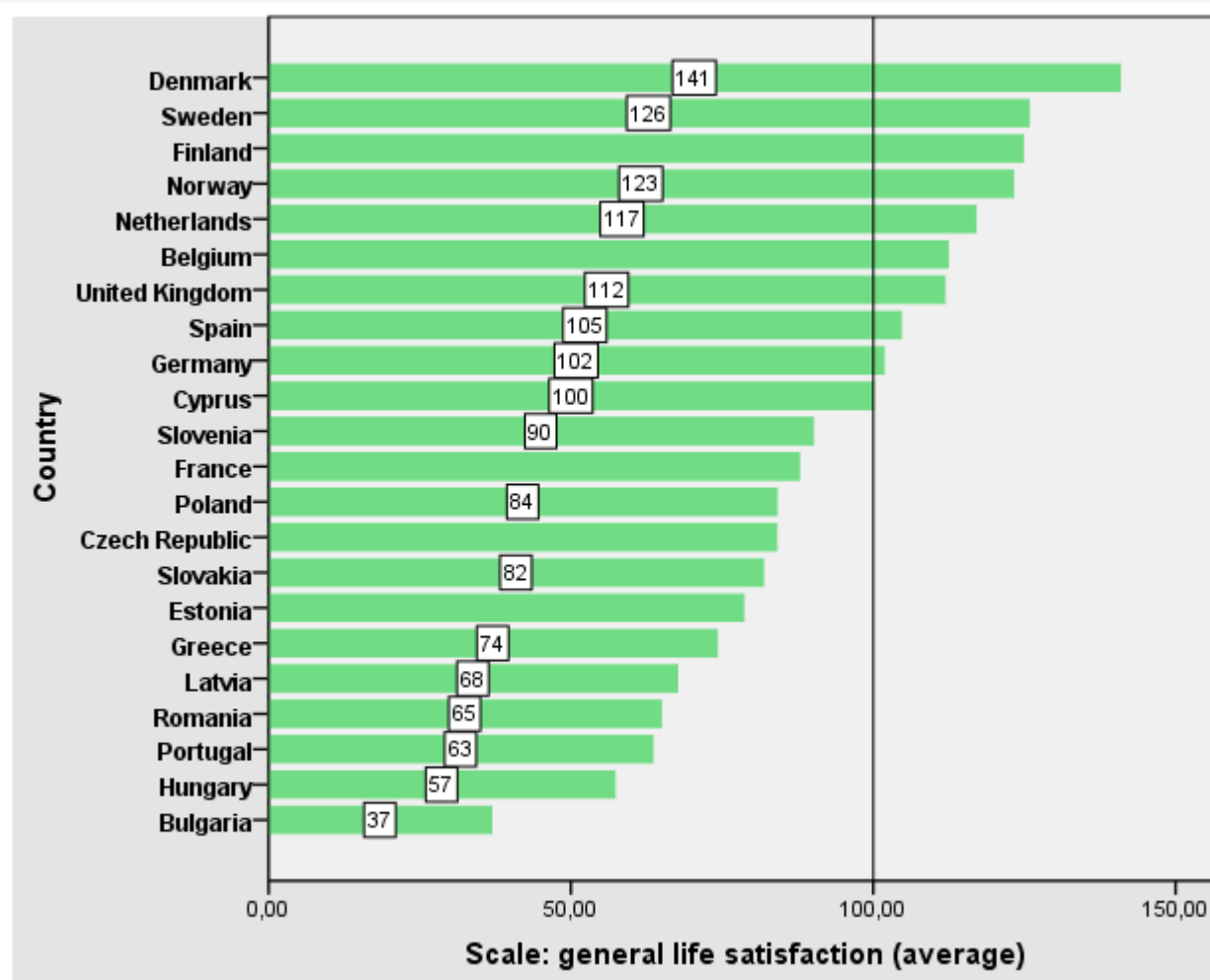
0,950 Percent participating in skill enhancement

0,864 Percent volunteering

Basis: ESS; analysis by FIFAS



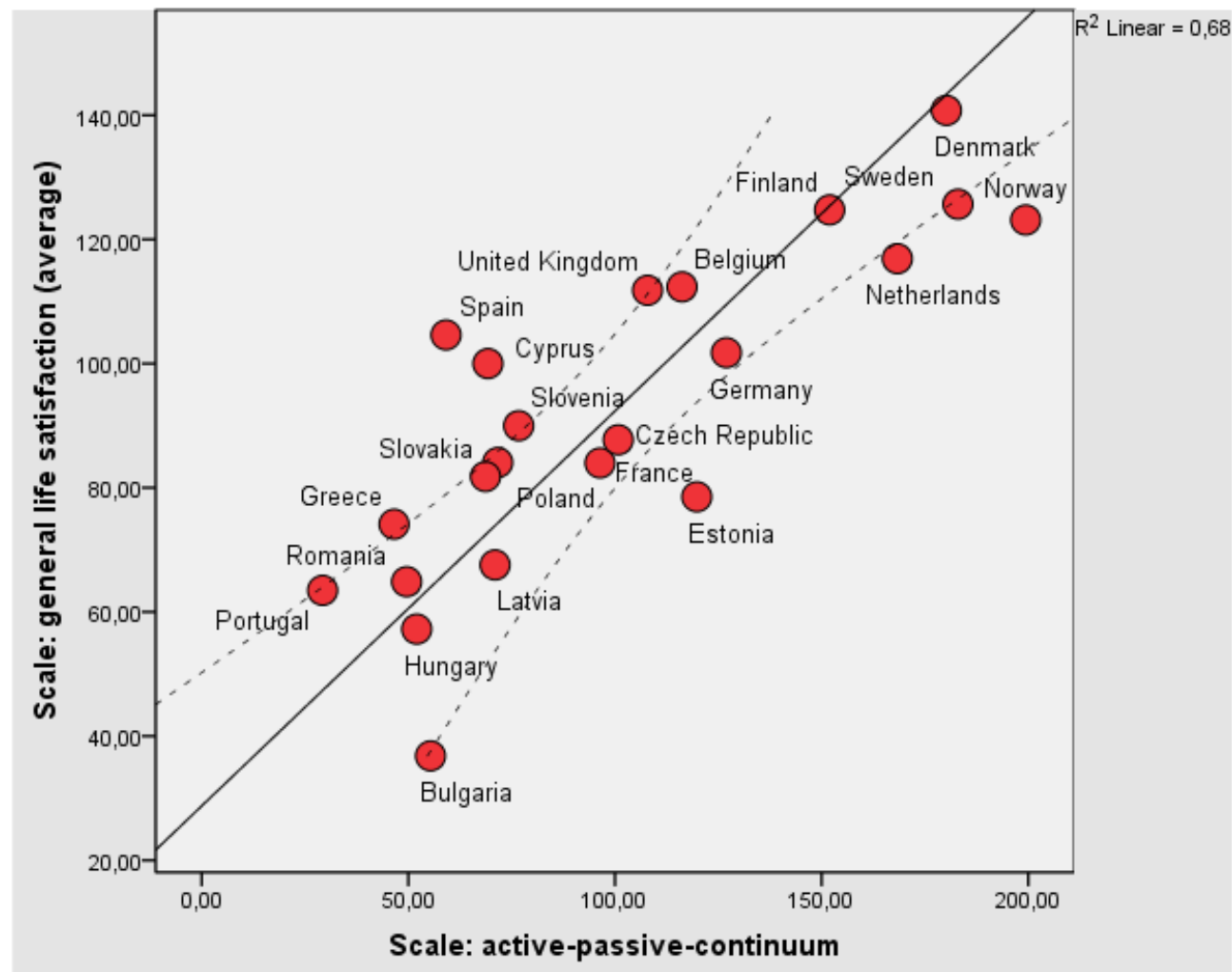
General life satisfaction in European Countries – age groups 50 +



Average: 100



General life satisfaction and position on the active-passive-continuum in European countries age groups 50 +



r=0,82
n=22 countries



Proposals for an explanation

Conditions on the level of countries

- Attributes of a successful state
 - Stability of the state
 - advanced welfare state, distributive justice
 - High trust into the political system

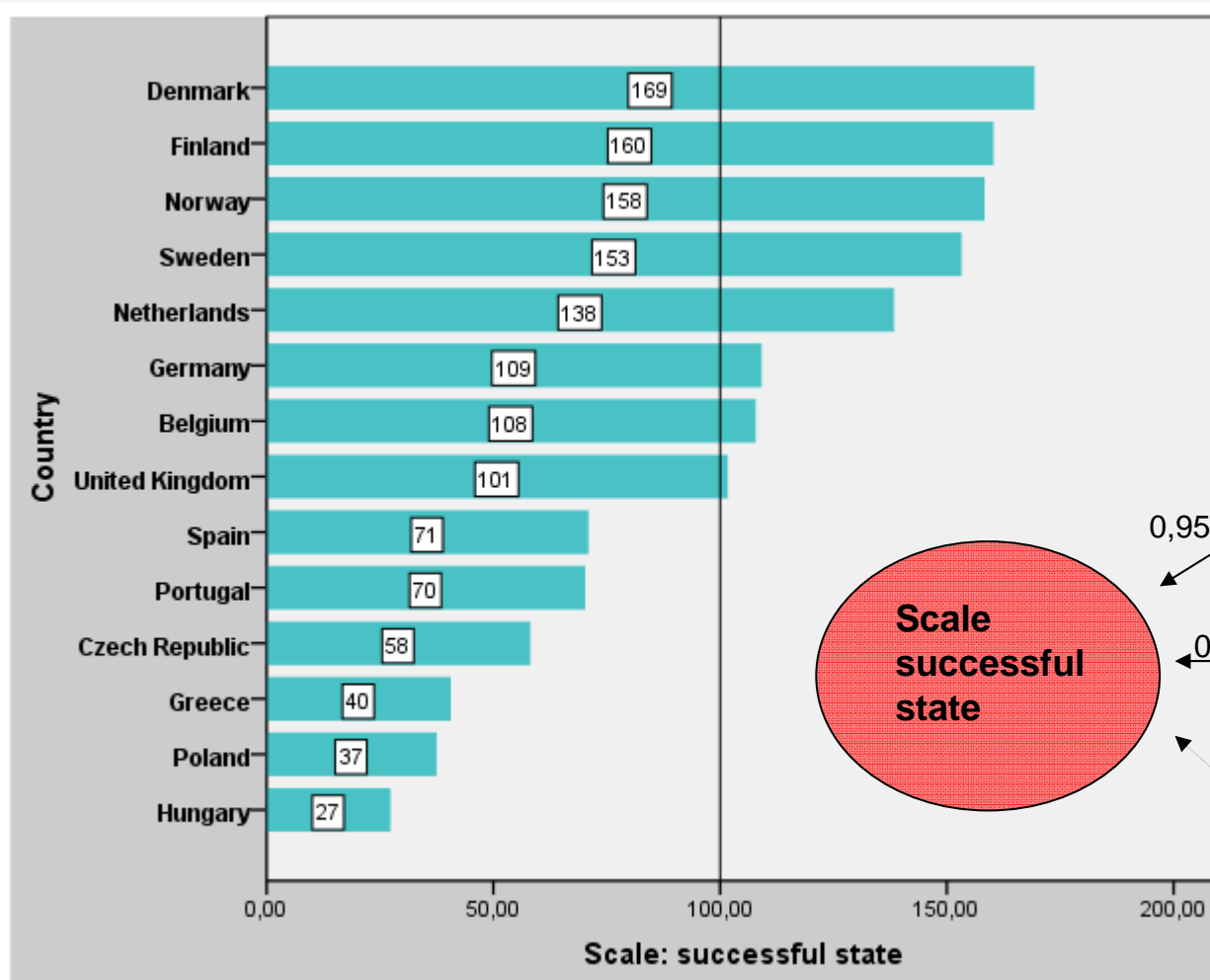


Definition of the concept „successful state“ by indicators of international statistics

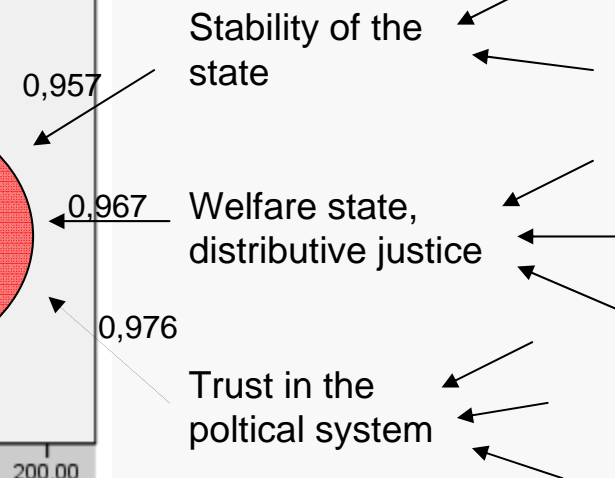
- **Stability of the state (Fund of Peace/Failed State Index, Worldbank)**
 - Corruption Index
 - Judicial / Legal Effectiveness
 - Corporate Governance Index
 - Criminalization or Delegitimization of the State
 - Progressive Deterioration of Public Services
 - Widespread Violation of Human Rights
 - Security Apparatus as "State within the State"
 - Rise of Factionalized Elites
- **Welfare state, distributive justice (Human Development Report, Bertelsmann-Foundation)**
 - Gender Empowerment Measure
 - Relation of male to female labour participation rate
 - Poverty rate,
 - Expenditures for education in percent of the GDP,
 - Rate of unemployment,
 - Rate of expenditures for the welfare state,
 - Gini-Index,
- **Trust in the political system (ESS4)**
 - Trust in country's parliament
 - Trust in the legal system
 - Trust in the police
 - Trust in politicians
 - Trust in political parties



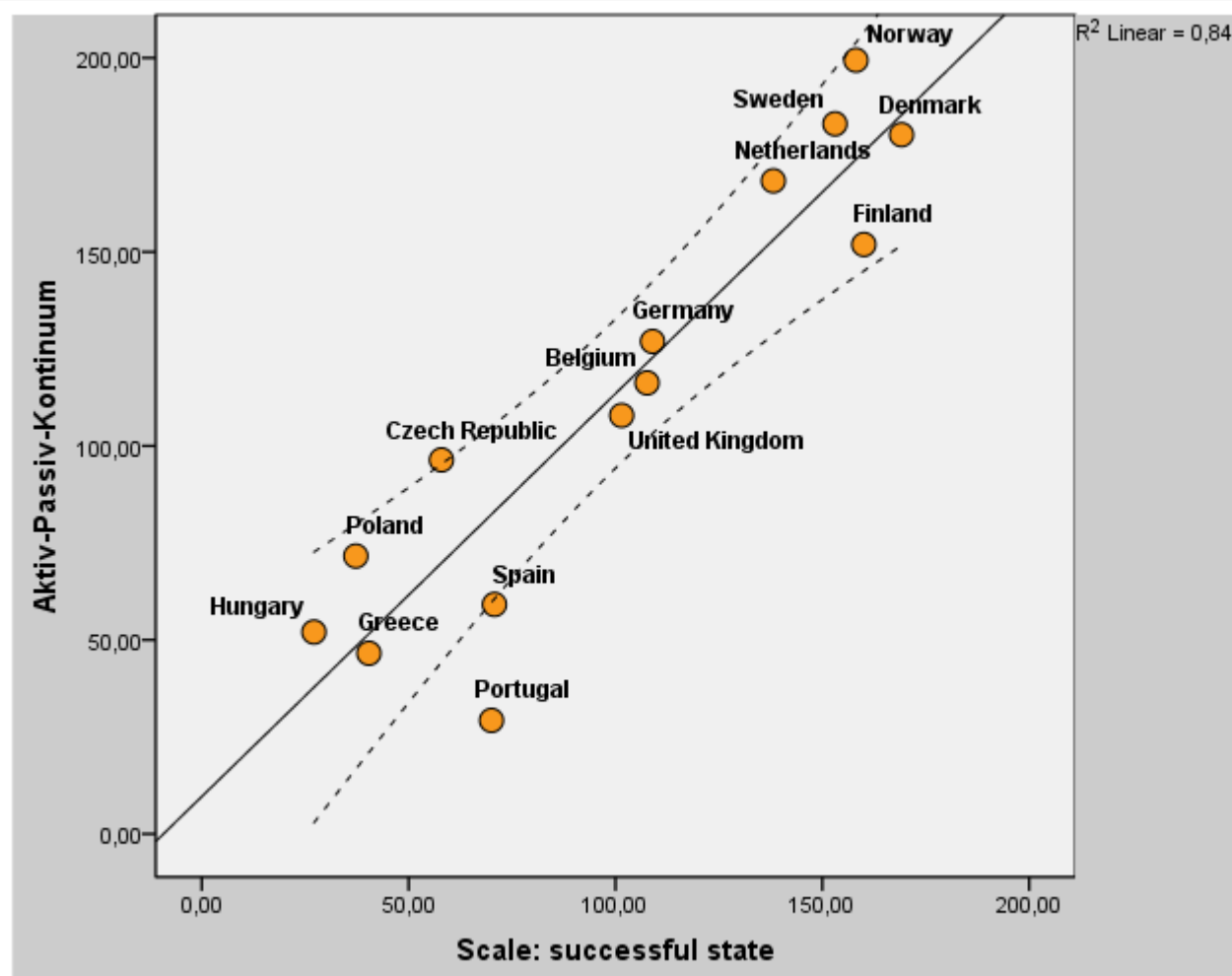
Position of European countries on the scale „successful state“



Faktoranalysis (Loadings)



Positions of European countries on the „active-passive-continuum“ and on the scale „successful state“



Proposals for an explanation

Conditions on the local level of cities:

- Prohibition of age specific discrimination
- Local employers as precursors
- Attractive offers for skill enhancement for higher age groups
- Possibilities for participation
- Encouragement of volunteering
- Public recognition of volunteering

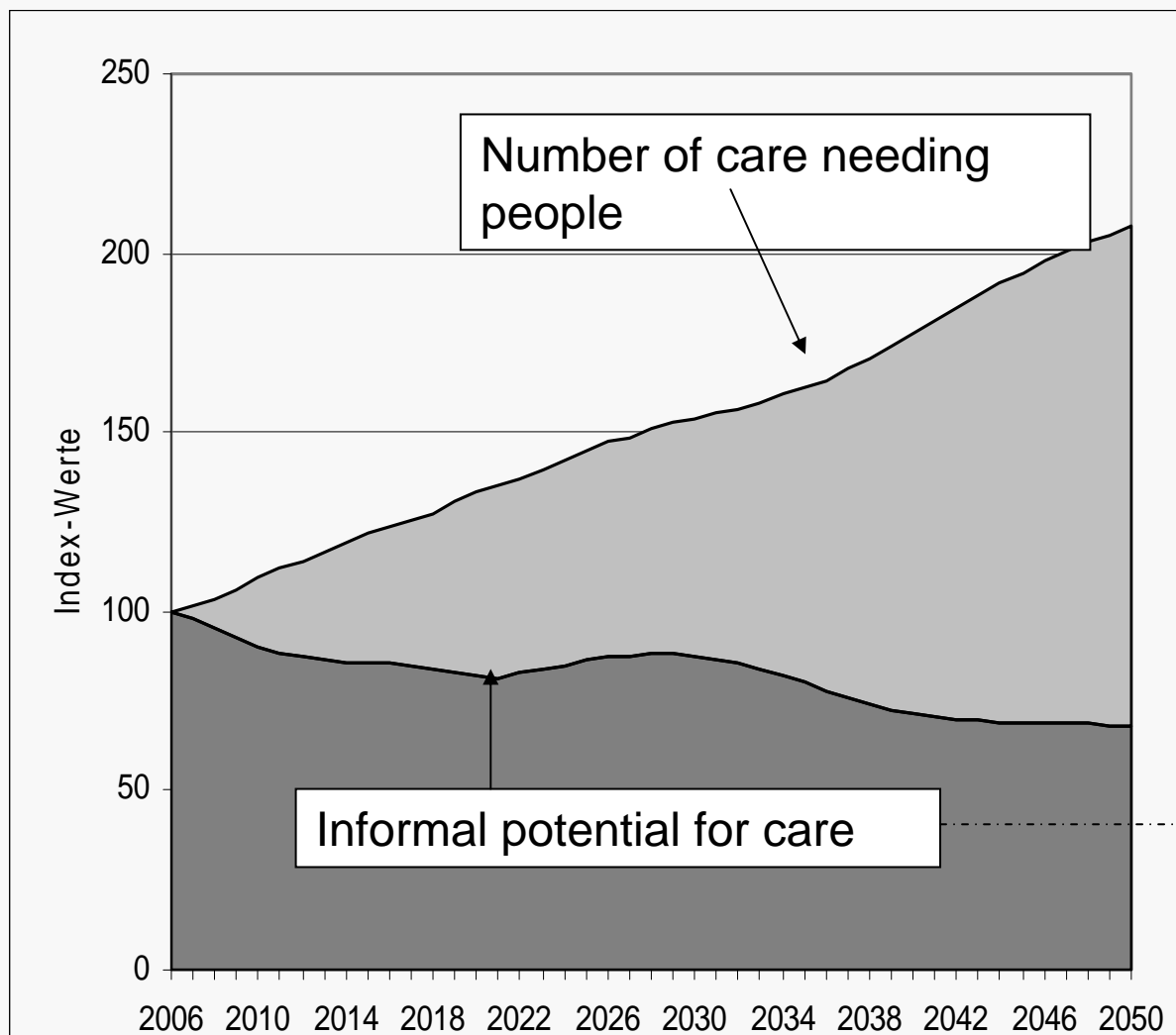


Set 2: long term care and solidarity

- Increasing gap between number of care needing people and informal care potential
- Two different „care cultures“ in countries and cities
- Relation between „primary“ and „secondary“ solidarity
- Proposals for explanation



Number of care needing people and informal potential for care – estimation of the development in Germany 2006 bis 2050 by a simulation



- Decreasing Number of people in the age group 30-60
 - Increasing Labour force participation rate esp. of women
 - Increasing Number of older people living alone
 - Decreasing importance of social milieus which prefer informal care
- 26



Relevant information concerning care

- What proportion of the age group 50 and older can trust in the availability of an informal social support network?
- How many had made experience with the supply of care?
- How are preferences and expectations regarding care distributed in a city?
- How is the quality and availability of infrastructures for health and care evaluated?
- How strong is the average preparedness for informal care in a city or country (the „care-culture“ of cities and countries)?



„Care cultures“

Traditional care culture

- Provision at home by close relatives without professional services
 - Germany: about 50 %

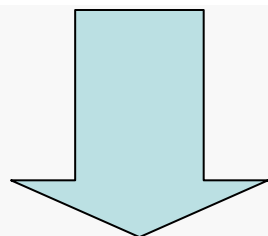
Care culture relying on professionalized care

- Provision by professional services
 - Germany: about 20 %
- Provision in a nursing home
 - Germany: about 30 %

„Care-culture“ of countries and cities: Preparedness for informal care – Indicators from the Eurobarometer

32 Imagine an elderly father or mother who lives alone and can no longer manage to live without regular help because of her or his physical or mental health condition? In your opinion, what would be the best option for people in this situation? Firstly and secondly? <Eurobarometer, QA7>

	Firstly	Secondly
They should live with one of their children	<input type="checkbox"/>	<input type="checkbox"/>
One of their children should regularly visit their home, in order to provide them with the necessary care	<input type="checkbox"/>	<input type="checkbox"/>
Public or private service providers should visit their home and provide them with appropriate help and care	<input type="checkbox"/>	<input type="checkbox"/>
They should move to a nursing home	<input type="checkbox"/>	<input type="checkbox"/>



Preparedness for informal care

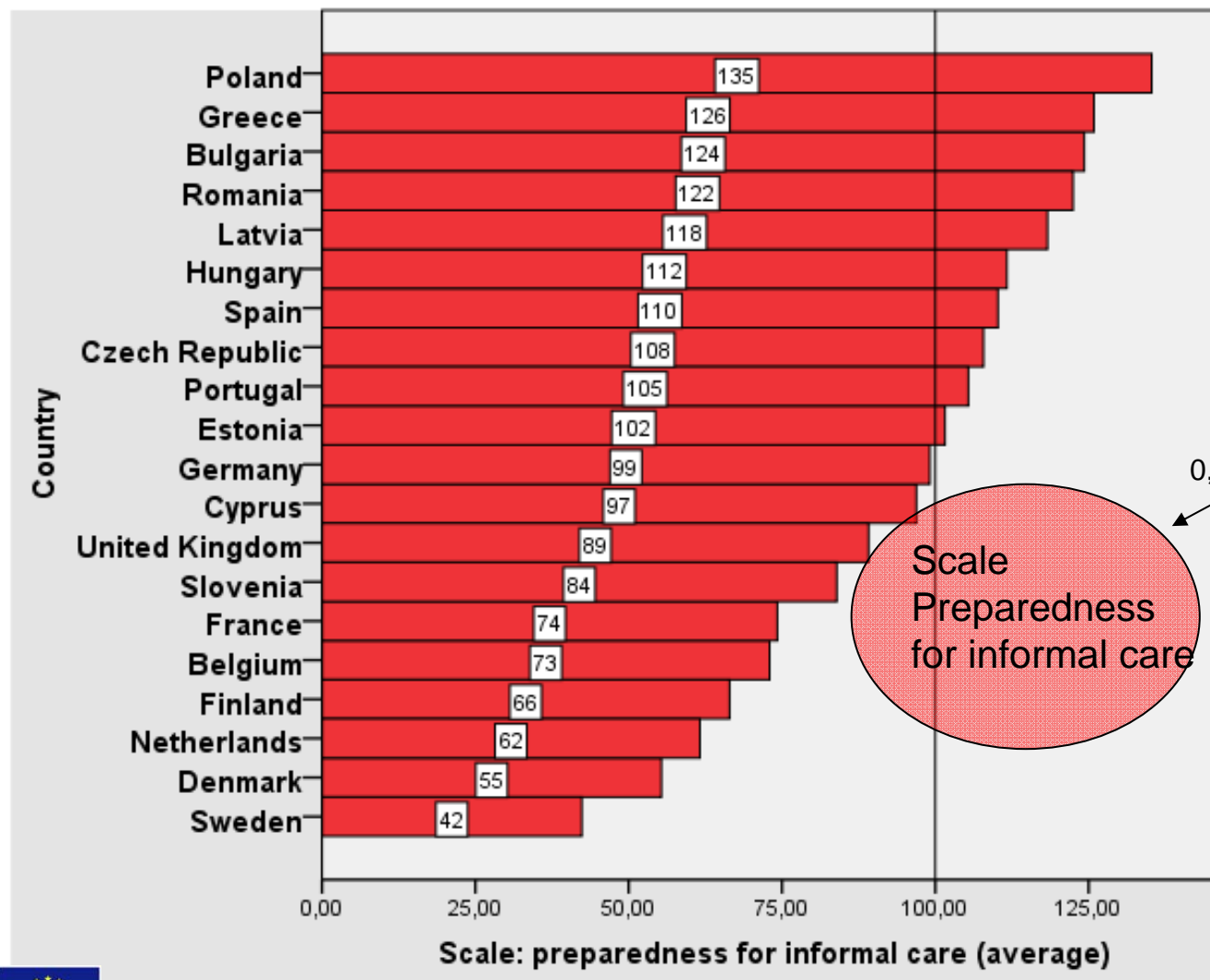
Low: **High:**

preference for
nursing home

preference for informal
care at home



Traditional care culture: Preparedness for informal care (average scale values) in European countries – age groups 50 +



Factor analysis (loadings)

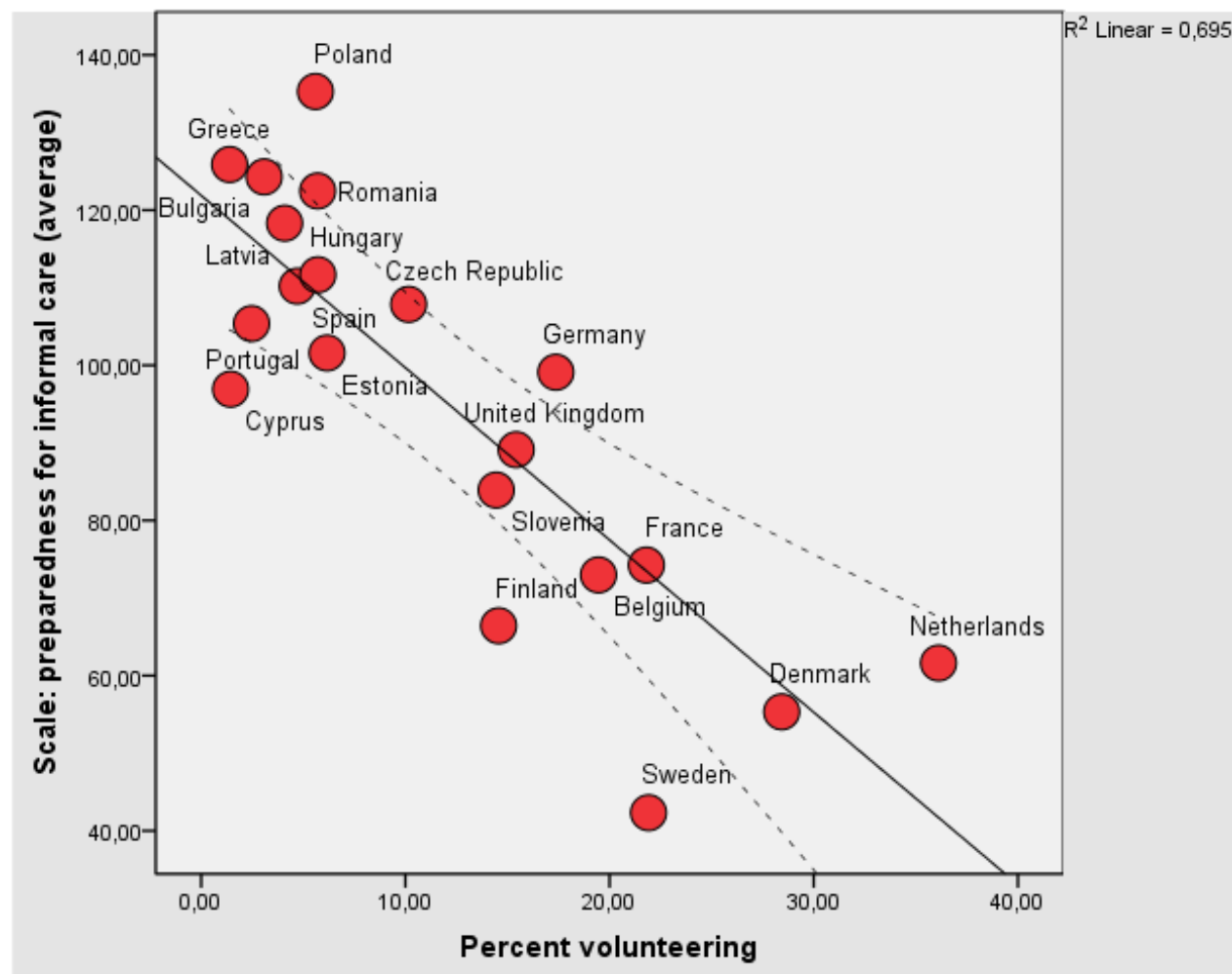
What is the best care for an elderly person?

- 0,739 Live with children
- 0,669 Visits of children
- 0,739 Visits of care services
- 0,703 Nursing home
- 0,697

Scale Preparedness for informal care



Relation of „Preparedness for informal care“ („primary solidarity“) and „percent volunteering“ („secondary solidarity“) in European countries age groups 50+



$r = -0,83$
 $n = 21$ countries

Eigenberechnung;
 Basis:
 Eurobarometer
 2007 und ESS4-
 3.0

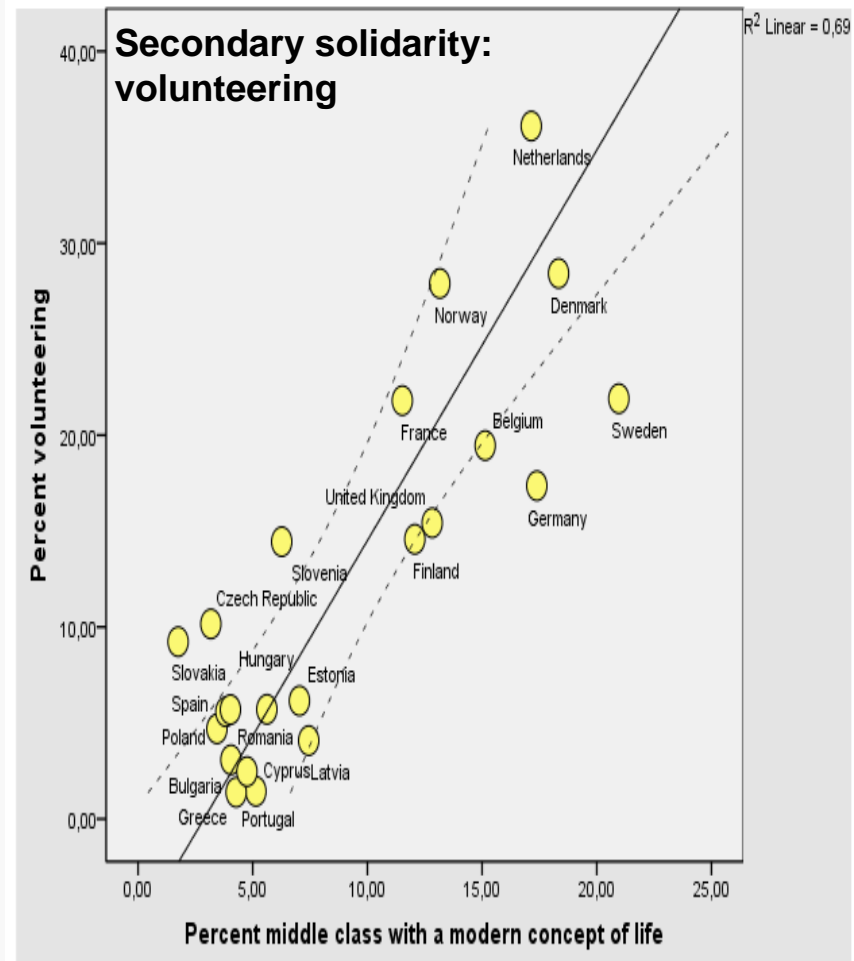
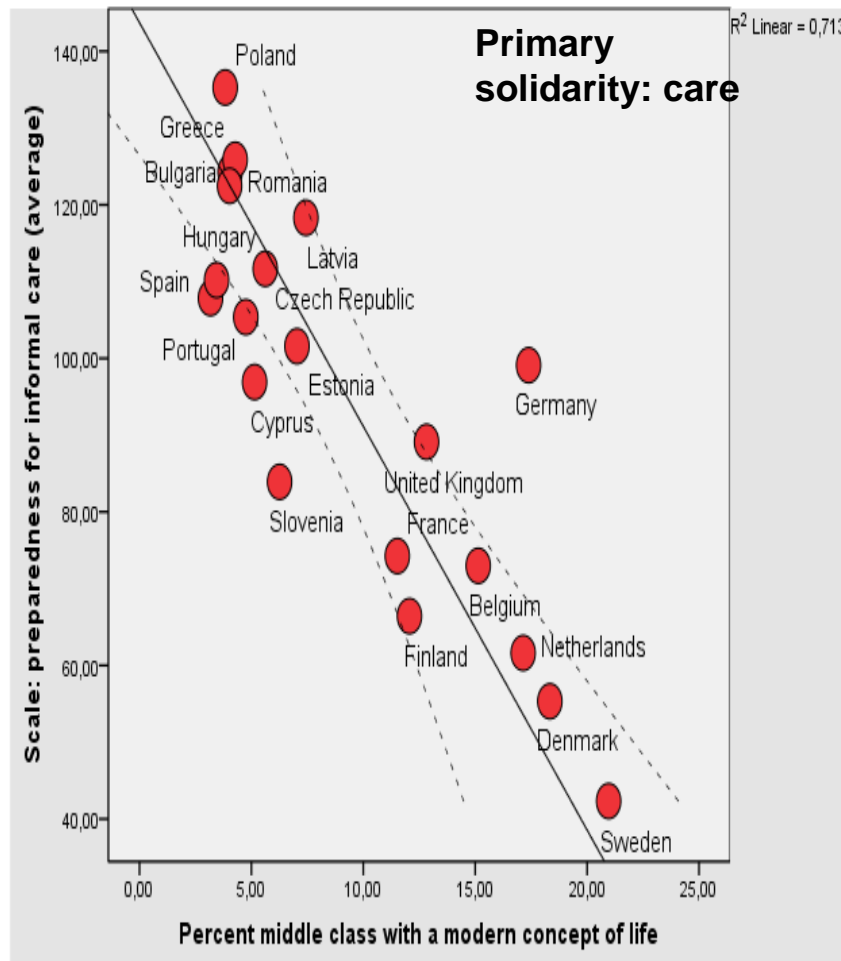


Proposals for an explanation

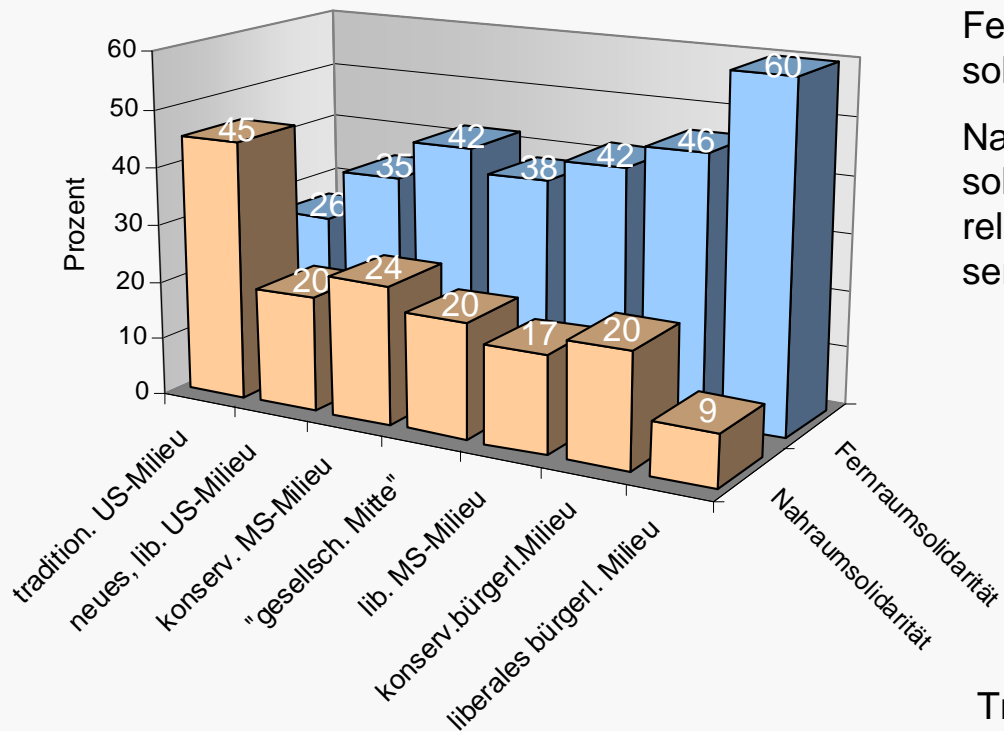
- Effect 1: „modernization“ – indicator: percent middle classes with a „modern concept of life“
- Effect 2: availability of a care infrastructure



The effect of modernization: „Modern concept of living“ and type of solidarity in European countries: age groups 50+



Excursion: the solidarity of social milieus in a German investigation



Fernraumsolidarität = „secondary solidarity“ (volunteering)

Nahraumsolidarität = „primary solidarity“ (informal care by relatives without professional services)

Tradition. US-Milieu = traditional lower class

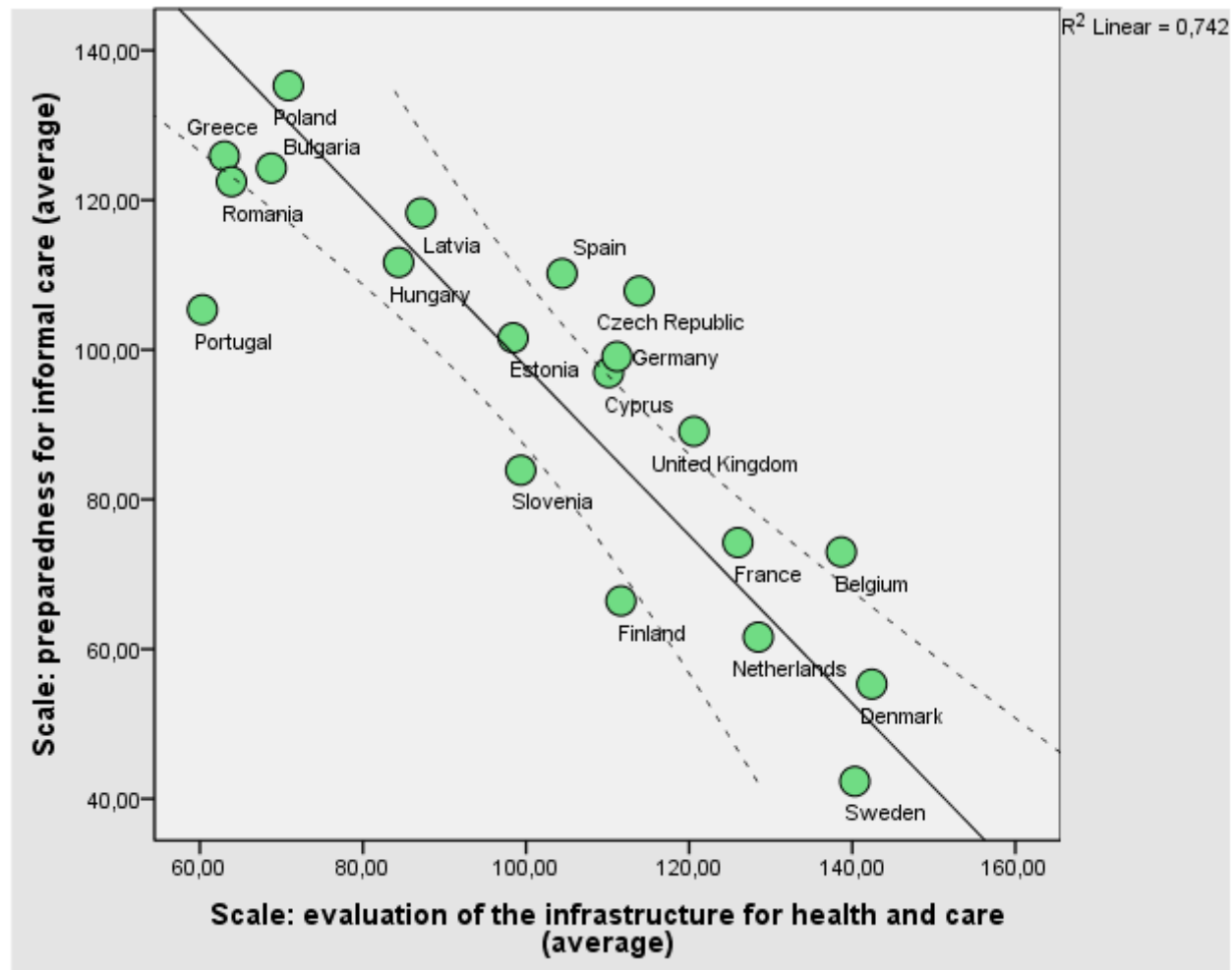
...

Liberales bürgerliches Milieu = middle class with a modern conception of life

Quelle: Kassel-Studie; Blinkert/Klie (2004)



The effect of the care infrastructure on the preparedness for informal care in European countries age groups 50+



Some conclusions

Regarding chances –
set 1: active or passive
adaptation to
demographic change?

- Enormous differences between countries
- Relevant factors: probably the condition of the state
- Differences between cities: important but still unknown
- Effect of conditions of the local level: probably very important but still unknown

Regarding challenges -
set 2: care and solidarity

- Not „end of solidarity“ but change of solidarity: from primary to secondary solidarity
- Few chances for the traditional provision by close relatives without professional services
- Overstrain of the system of social security and culture if nothing happens
- New forms of provision are needed
- What solutions are practiced in cities?