

CONCEPTUAL DIAGRAM FOR THE ELDERLY:

an analytical methodology for the
visualization of complex problems
with territorial cluster applications

Lisbon, 30th June 2016

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2. The conceptual diagram framework

What is a conceptual diagram?

A structural and simplified visual display

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4. Challenges ahead

1. How did it start?

2012 – Preparing the conceptual framework to discuss the new *Operational Programme of Employment and Social inclusion 2014-2020*:

“Presentations for policy makers have to be both detailed and intuitive”

And built a conceptual diagram for analysing the Portuguese complex labour market.

2015 – Decision to apply the conceptual diagram to other population groups

2016 – **Discussing the elderly conceptual diagram:**



- Tarki Research Centre in Budapest - visiting grant to Hungary to compare their a system indicators for the elderly development with our own conceptual framework
(IPOLIS - Integrated Poverty and Living Condition Indicator System)

2016 – **Validating the diagram as a tool for visualization of complex problems:**

Presentation at Luxembourg’s Expert workshop “Visualization and outreach to stakeholders” (with World Bank, UNICEF, Eurofound, HelpAge International, Unesco, The Guardian,...)

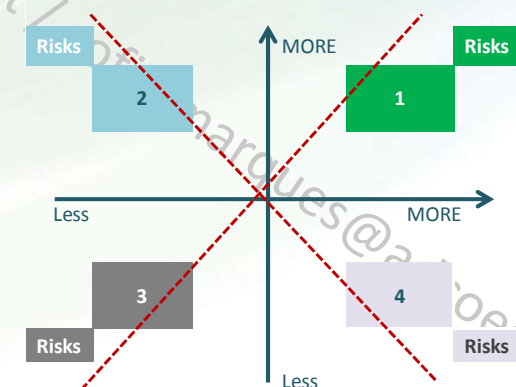
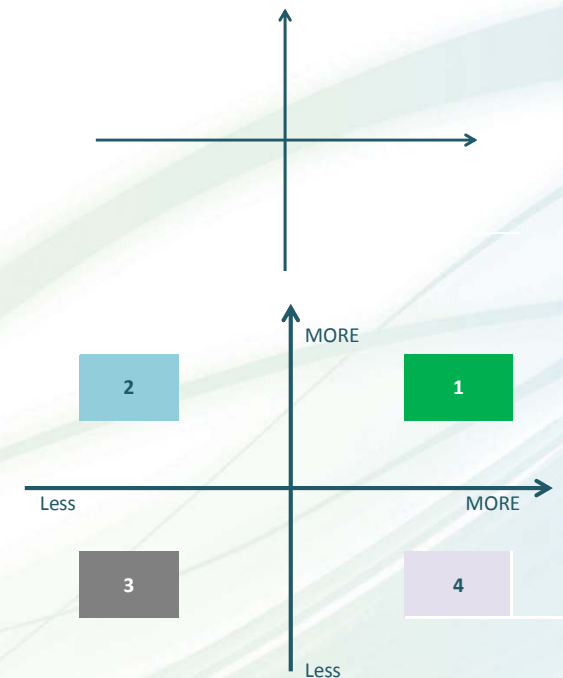
Building the analytical framework (Phase 1)

1. Define the analysis axes: **main drivers**
2. Identify the quadrants: **main profiles**
3. Signalling the risks and evolving vectors:
main effects due to changing processes

- Caused by Contextual changes
- Population characteristics changes

4. Characterize the quadrants and axes

- With qualitative and quantitative instruments (Indicator Systems or Composite or single indicators)
- Guaranteeing comparability, reliability for **adequate territorial and temporal levels**



Building the analytical framework (Phase 2)

5. Identify policies and measures

List the policies that best :

- meet the needs of the identified populations
- increase development and quality of life

6. Monitoring and evaluation policies and measures

This strategic monitoring and evaluation perspective relies on a **system of indicators that gives information on results and impacts**

Identification of public policies and measures





at <http://p3.publico.pt/cultura/palcos/5451/lata-65-idade-e-um-numero>

3. CASE STUDY - the elderly

3.1 Applying the conceptual diagram

... The elderly aren't all the same...

dynamic # dependent # unprotected # disadvantaged

Motivation to apply the conceptual framework

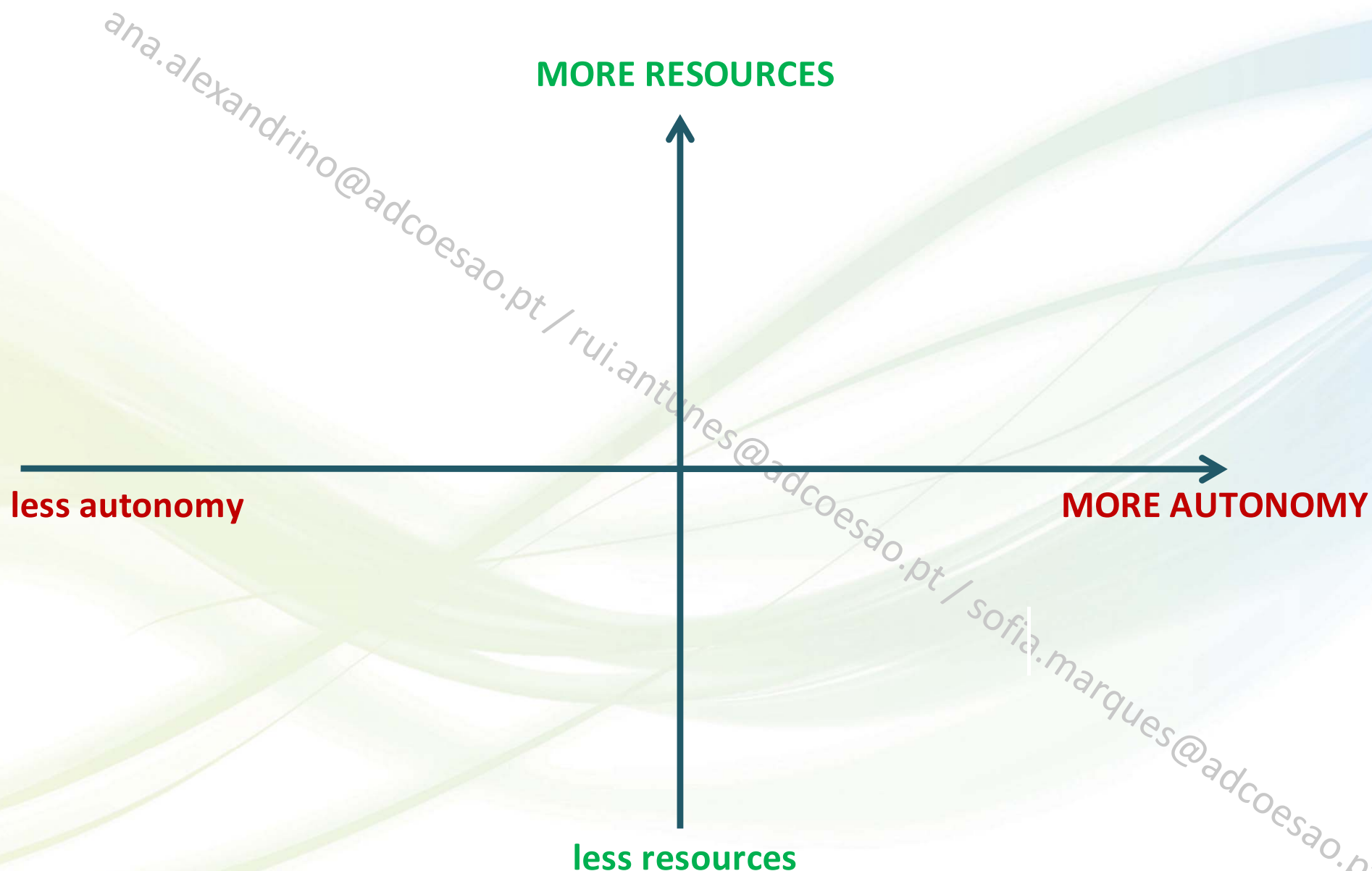
Some facts:

- In Portugal, 1 out of 5 inhabitants is aged over 65 (around 2 million persons).
- For every 100 active age persons there are 31 old people.
- In the EU context, Portugal is one of the most aged countries.
- Among Western European countries has the 3rd worst position in the Global AgeWatch Index 2015 (that evaluates the socioeconomic wellbeing of the elderly).

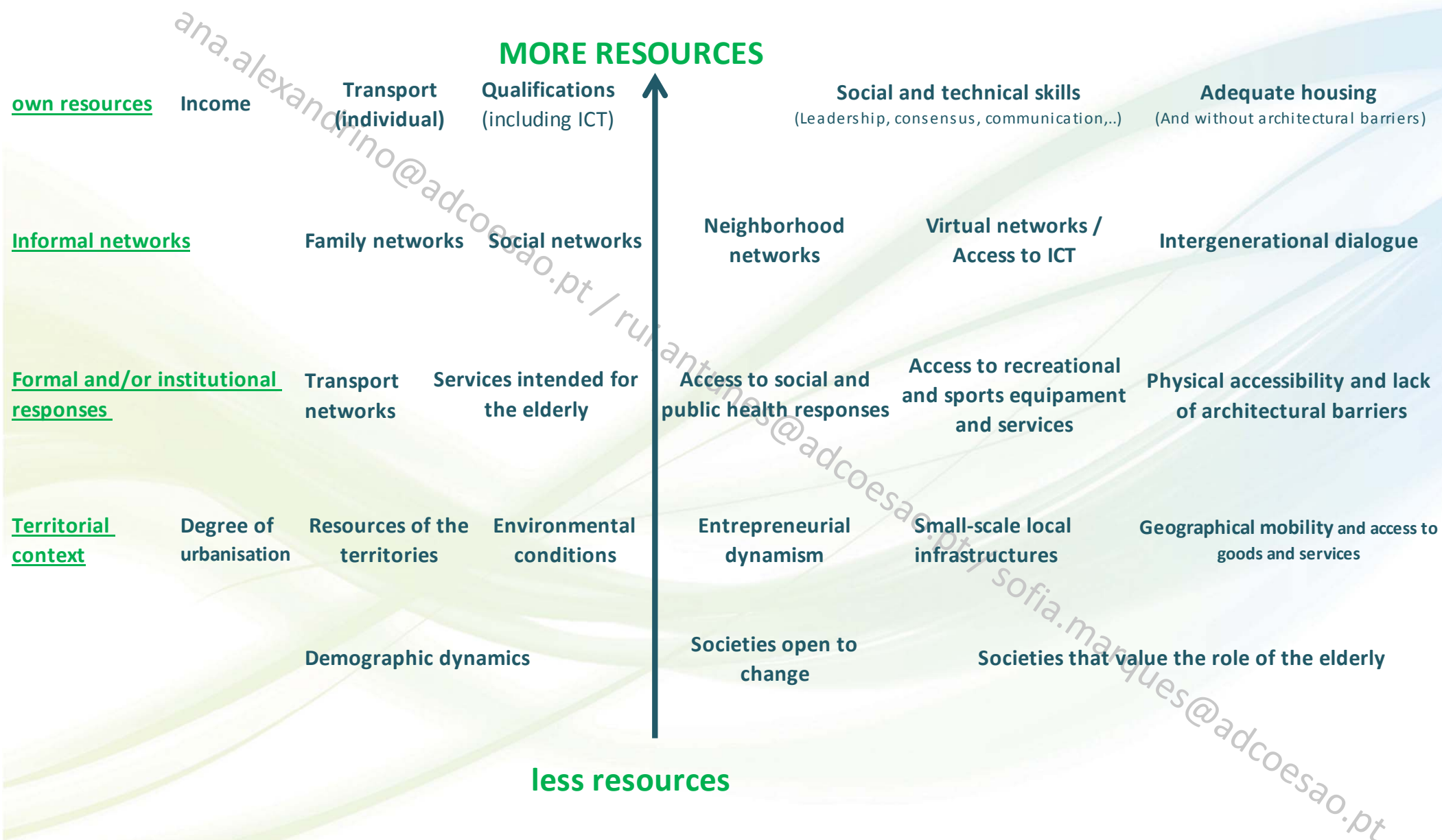
In accordance with the internationally consensus...

Desirable Scenario for Inclusive growth for the elderly	Flagship initiatives for the elderly	Cross action strategies
Establishing the conditions necessary to active and healthy ageing with greater levels of autonomy and higher quality of life (and reducing isolation, poverty and social exclusion)	European Year of Ageing and Inter-generational Dialogue initiative (2012)	<ul style="list-style-type: none">• Empowerment, activation of the potential of the elderly• Preventive and Remedial Actions or policies

The axes or the main drivers

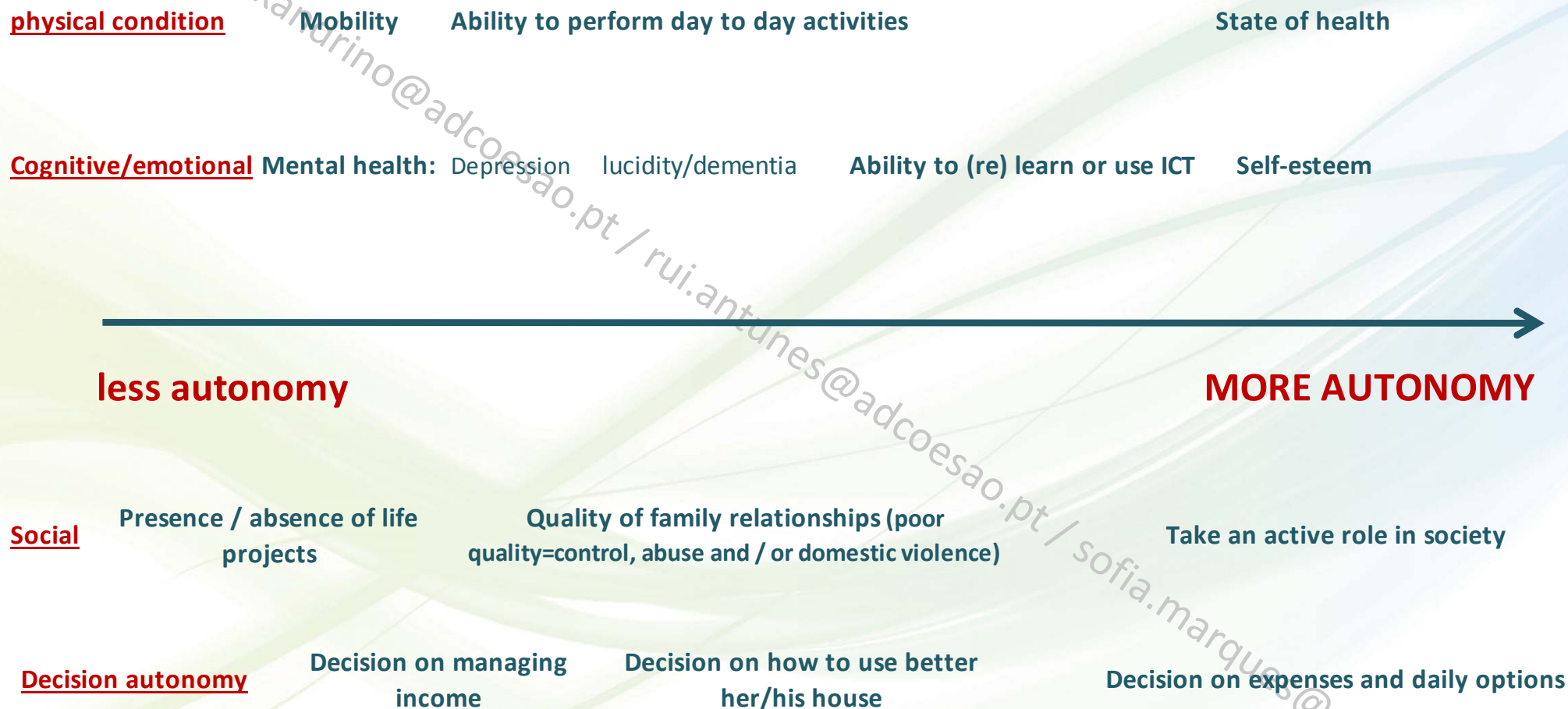


The Resource Axis

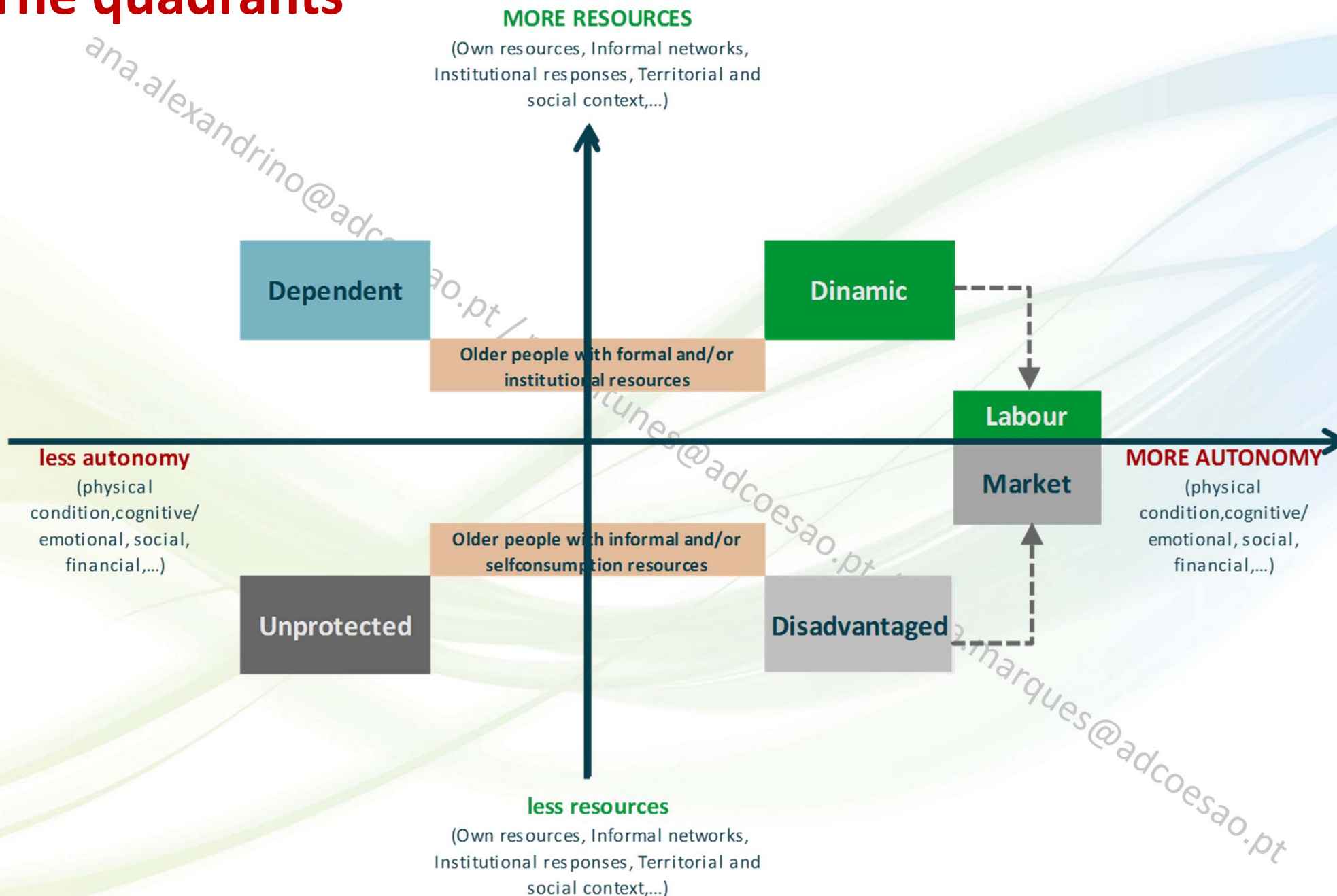


3.1 Applying the conceptual diagram to the elderly

The Autonomy Axis



The quadrants



Describing the quadrants

2) Dependent

With resources/without autonomy

- Have relative material comfort but **experience limitations and reduced mobility;**
- **They need institutional or family member support** to meet their daily needs.

Includes both those living in residential homes as well as those receiving support at home

3) Unprotected

Without resources/without autonomy

- **Unable to undertake daily tasks or make decisions over matters relating themselves.**
- **Don't benefit from any support** / have low income levels/live in no public services areas.
- Their basic needs go barely met + face violence, maltreatment, lack of accessibility (territorial, housing).

May be completely isolated or on the survival threshold

1) Dynamic

With resources/with autonomy

- **Higher levels of income , qualified;** living in well-equipped territories; have access to services;
- **play active roles** in their social context (e.g. supporting dependents as carers or family member volunteering)

May be in the labour market and even contribute to the social security system.

4) Disadvantaged

Without resources/with autonomy

- **Lack own resources** or live in contexts that don't provide goods and services (e.g. transport, housing).
- **Postpone retirement or combine low pension levels with other types of earnings.**
- On occasion, provide for other family members experiencing unemployment and over-indebtedness.

May stay in the labour market, out of a need for resources.

The processes of ageing as an evolving vector

Autonomy axis :

Age is likely to be inversely related to autonomy : Old age is associated with low autonomy

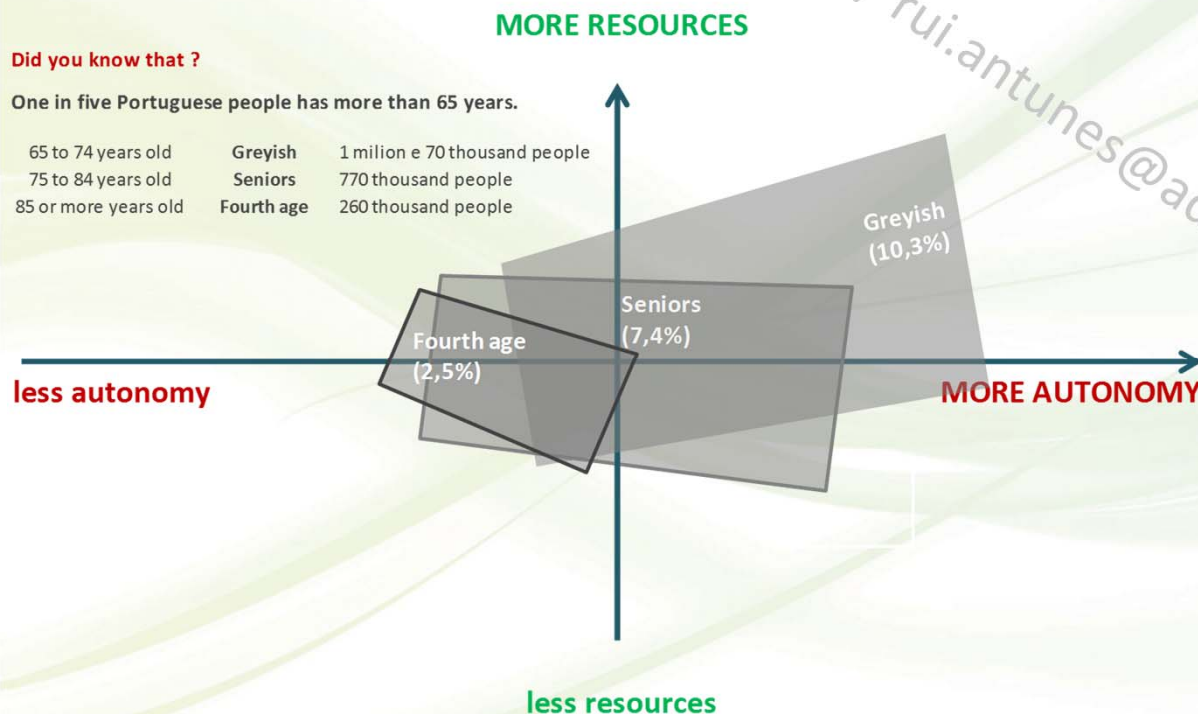
Resources axis:

Age is likely to be inversely related to resources: Old age is associated with less resources

Did you know that ?

One in five Portuguese people has more than 65 years.

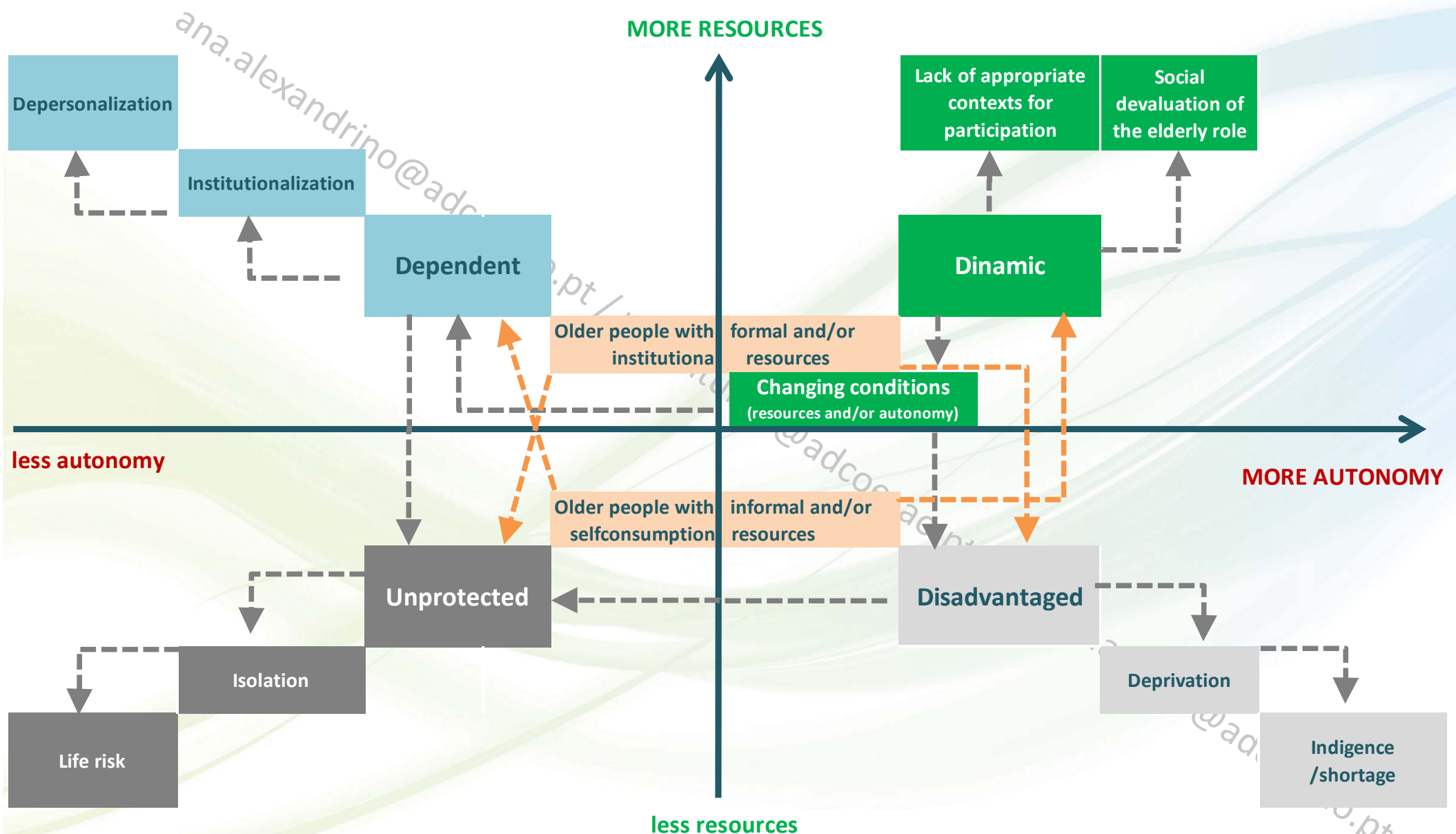
65 to 74 years old	Greyish	1 million e 70 thousand people
75 to 84 years old	Seniors	770 thousand people
85 or more years old	Fourth age	260 thousand people



Less income means:

- In a context of inflation, **pensions depreciate over time.**
- **There are more expenses**, i.e. higher spending on medicines, increased need for support (health care, in carrying out day to day tasks, etc.).
- **Higher proportion of people with shorter contributory careers** and lower qualifications with implications on the pensions values.

Associated risks





at <http://p3.publico.pt/cultura/palcos/5451/lata-65-idade-e-um-numero>

3. CASE STUDY – the elderly

3.2 Characterizing the elderly based on different indicators

- Axes indicators
- Quadrants indicators

... The elderly aren't all the same...

the greyish # the seniors # the 4th agers

Axes indicators

Objectives

to compare,
to rank and
to monitor
evolution

e.g. Show the
relative position of
Portugal within the
European context

Best approach

System of
indicators by
components &
subcomponents

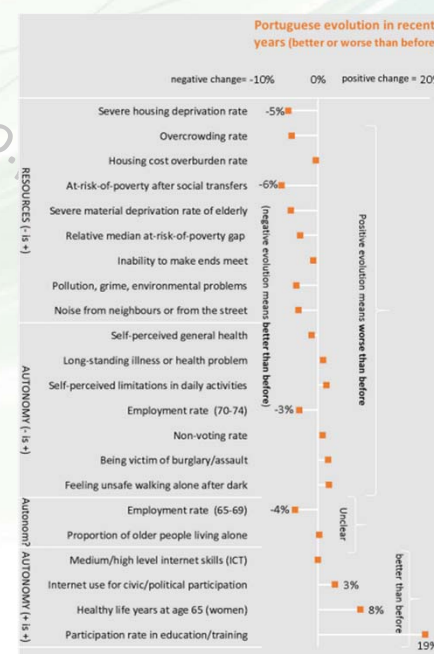
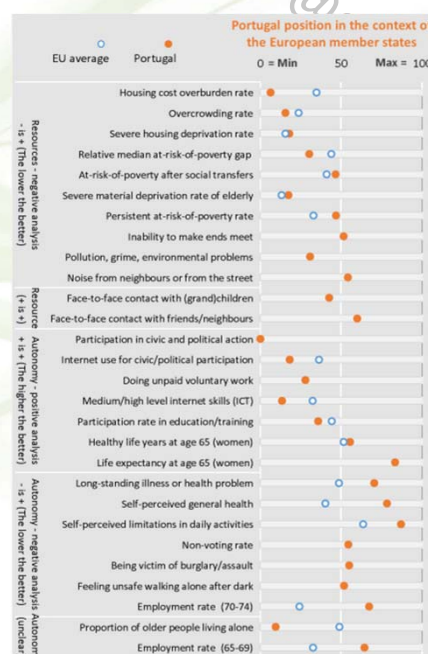
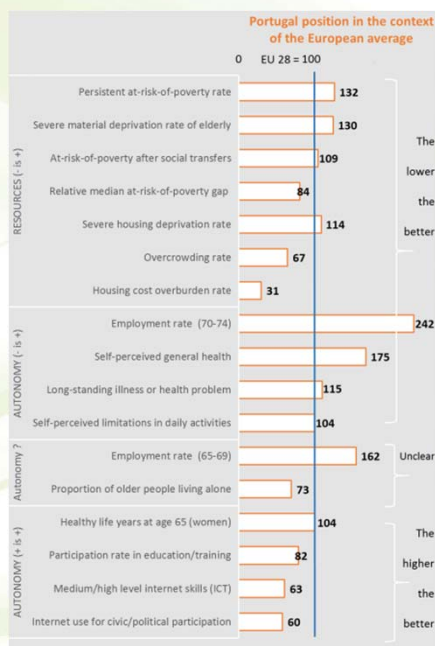
e.g. IPOLIS : Integrated
Poverty and Living
conditions Indicator
System

Advantages

- i) Provides methodological and statistical framework to monitor the situation of vulnerable groups;
- ii) Contains statistical information from different sources and areas;
- iii) Provides comparable information (time and country) for each indicator.

Data gaps / limitations

- i) Doesn't provide an individual level measure for each quadrant;
- ii) Not available at subnational territorial level or microdata;
- iii) Not possible to have an elderly global evolution view – some indicators improve, others deteriorate.



Portugal position in the context of the European average



3.2 Characterizing the elderly based on different indicators

Axes indicators

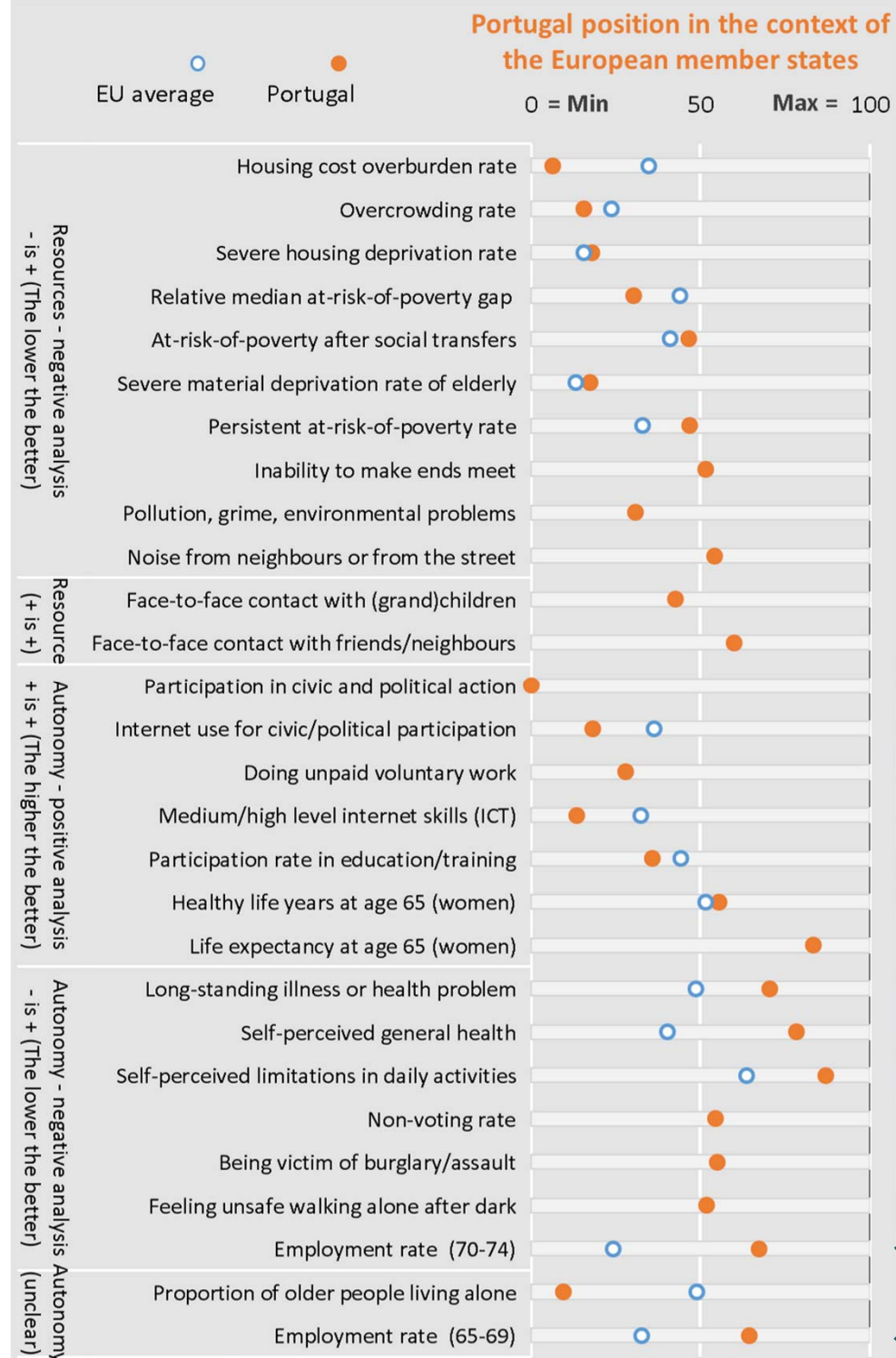
How does Portugal perform in the context of the EU average?

On the **Resources** axis, Portugal has weak performance regarding material living condition indicators.

Most of the **autonomy indicators** score badly when contrasted with EU average.

Employment rate for the aged between 70 to 74 (and 65-69) is much higher in Portugal, relatively to EU avg.

However, it's not clear if it's a sign of autonomy or deprivation.



3.2 Characterizing the elderly based on different indicators

Axes indicators

How does Portugal perform in the context of other EU members states

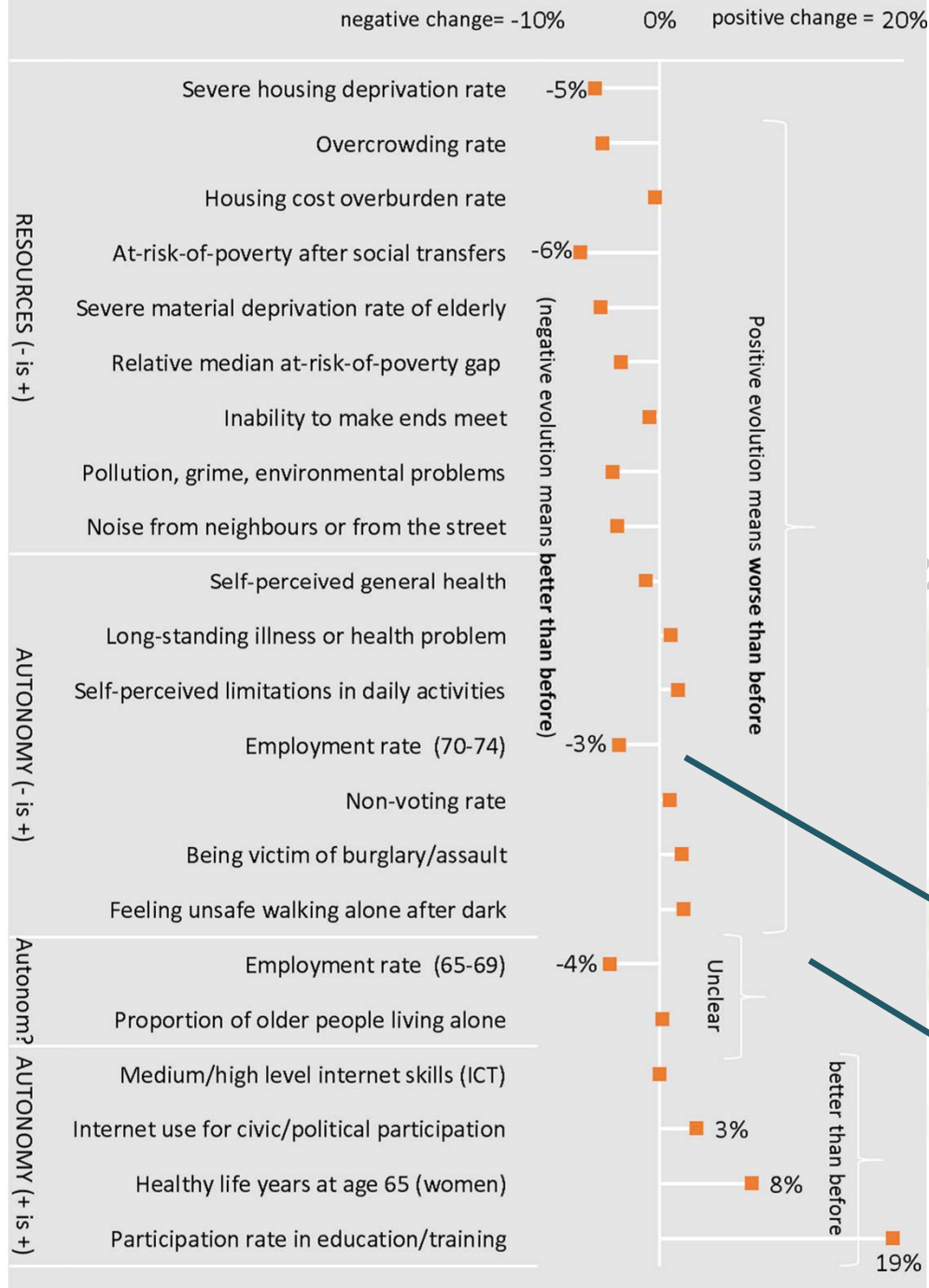
Regarding **resource** indicators, Portugal's position is not the worst result registered by a member state, even if it scores below the medium point (50%).

Comparative to other member states Portugal achieves no more than average performance rates in **autonomy** indicators.

e.g. the employment rate for old people is quite high in Portugal, but it's not the highest of the 28 member states.

3.2 Characterizing the elderly based on different indicators

Axes indicators



How was the evolution of Portugal in the recent years?

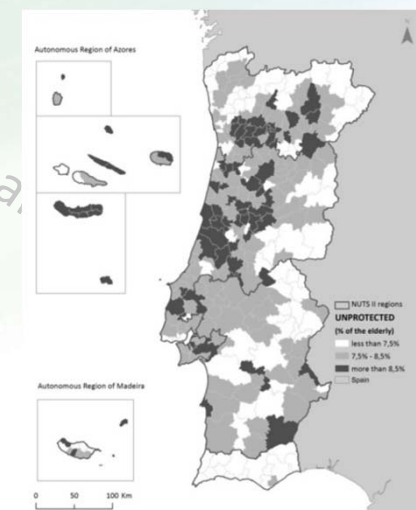
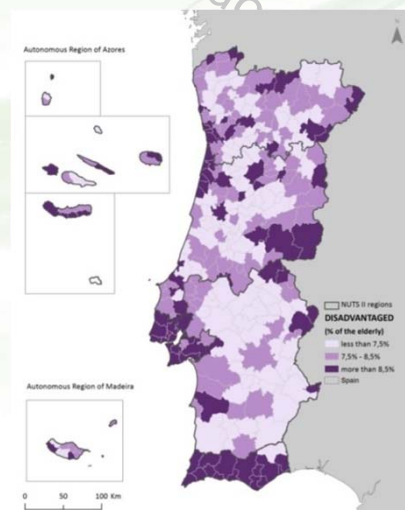
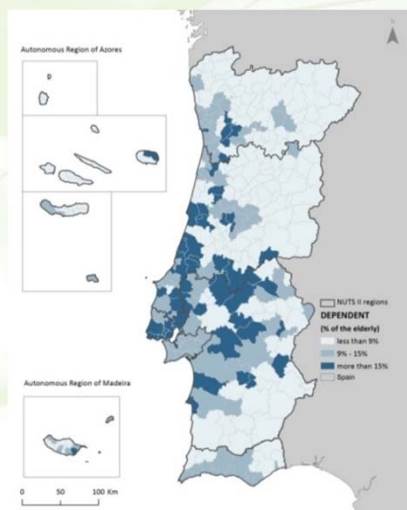
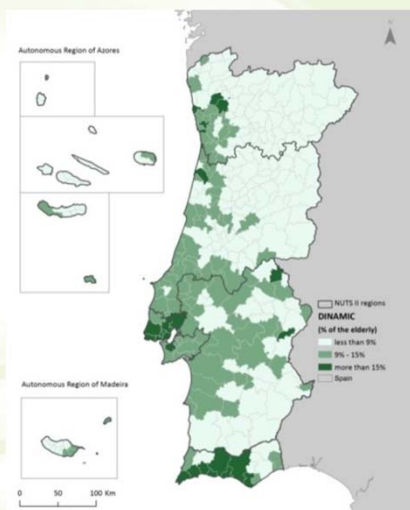
The Portuguese evolution has been positive considering material living conditions and other **resource** indicators.

In the last decade, improvement has been quite strong in **autonomy** indicators

e.g. although the employment rate for old people has been dropping in recent years, it is still high, with more than 1 out of 10 seniors employed.

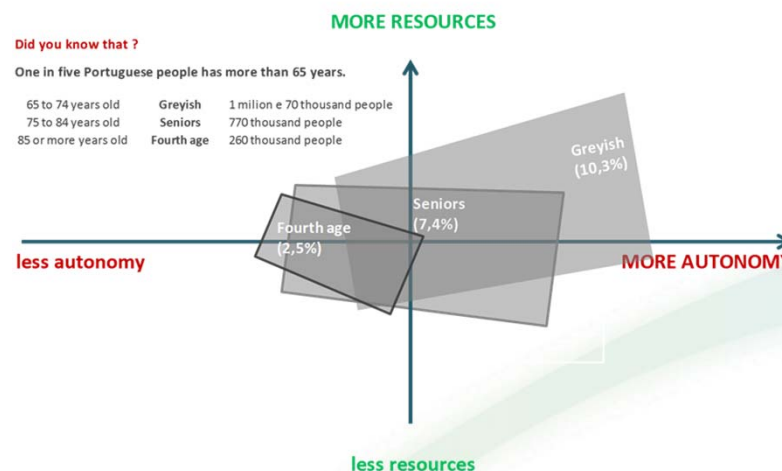
Quadrants indicators

Objectives	Best approach	Advantages	Data gaps / limitations
<p>to identify, portray and quantify at individual level</p> <p>e.g. Quantifying how many elderly are classified as dependent in each Portuguese municipality</p>	<p>Unique Indicator</p> <p>e.g. Census 2011 indicator</p> <p>(municipalities level)</p> <p>“Resident population with at least one difficulty by age group and main source of income”</p>	<p>i) Provides credible and disaggregated information for different elderly subgroups and territorial levels;</p> <p>ii) Enables quantification of people assigned to each axis (resources or autonomy);</p> <p>iii) Guarantees an accurate universe, avoiding double counting issues, etc.;</p> <p>iv) Allows identification of municipality territorially based patterns.</p>	<p>i) Not using the most up-to-date information;</p> <p>ii) Providing one single indicator;</p> <p>iii) Leaving out the task of quantifying other axis components;</p> <p>iv) Some rigidity in positioning individuals on the axes due to Census concepts and their methodological limitations.</p>



3.2 Characterizing the elderly based on different indicators

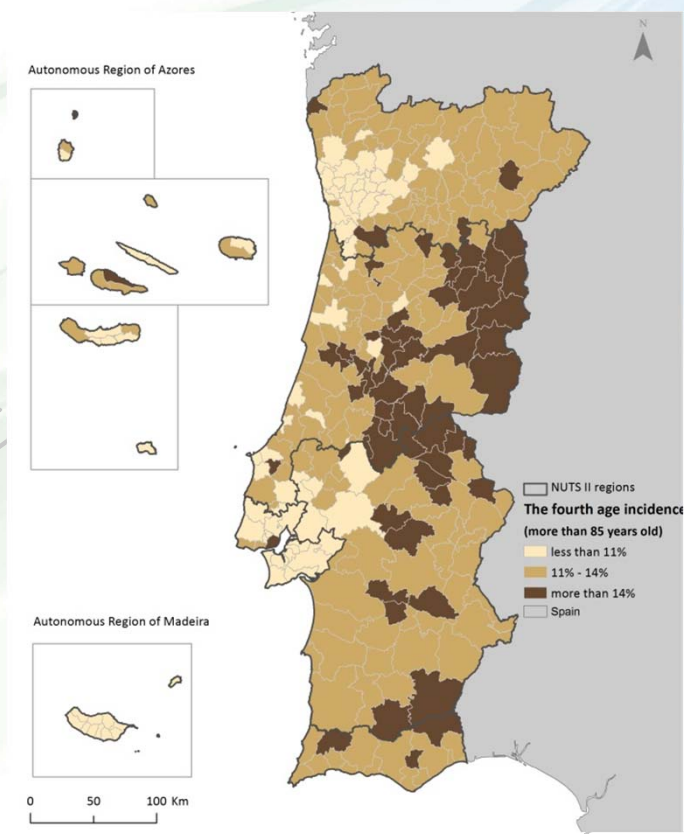
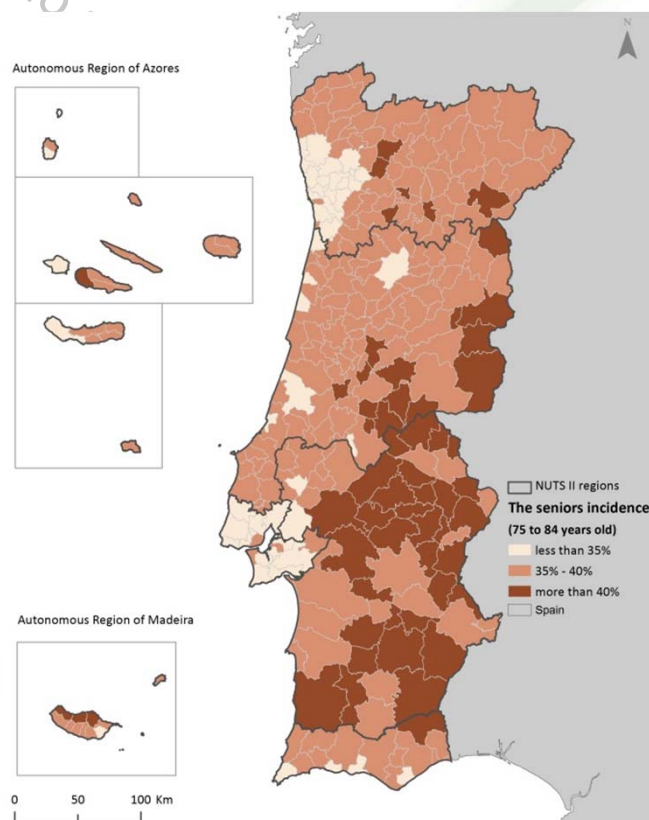
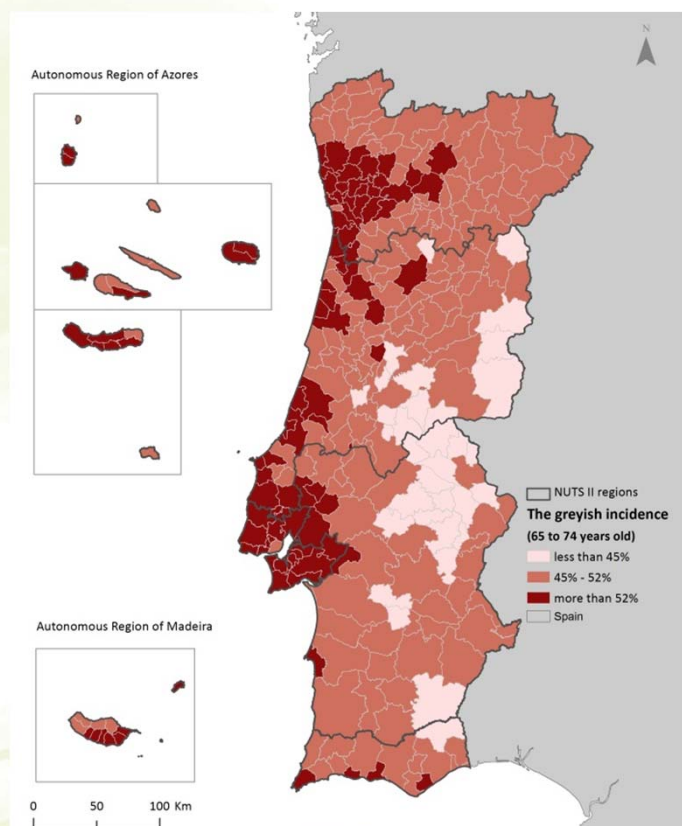
Portraying the elderly distribution



The Greyish (65-74 years old)

The Seniors (75-84 years old)

The 4th agers (85 or +)

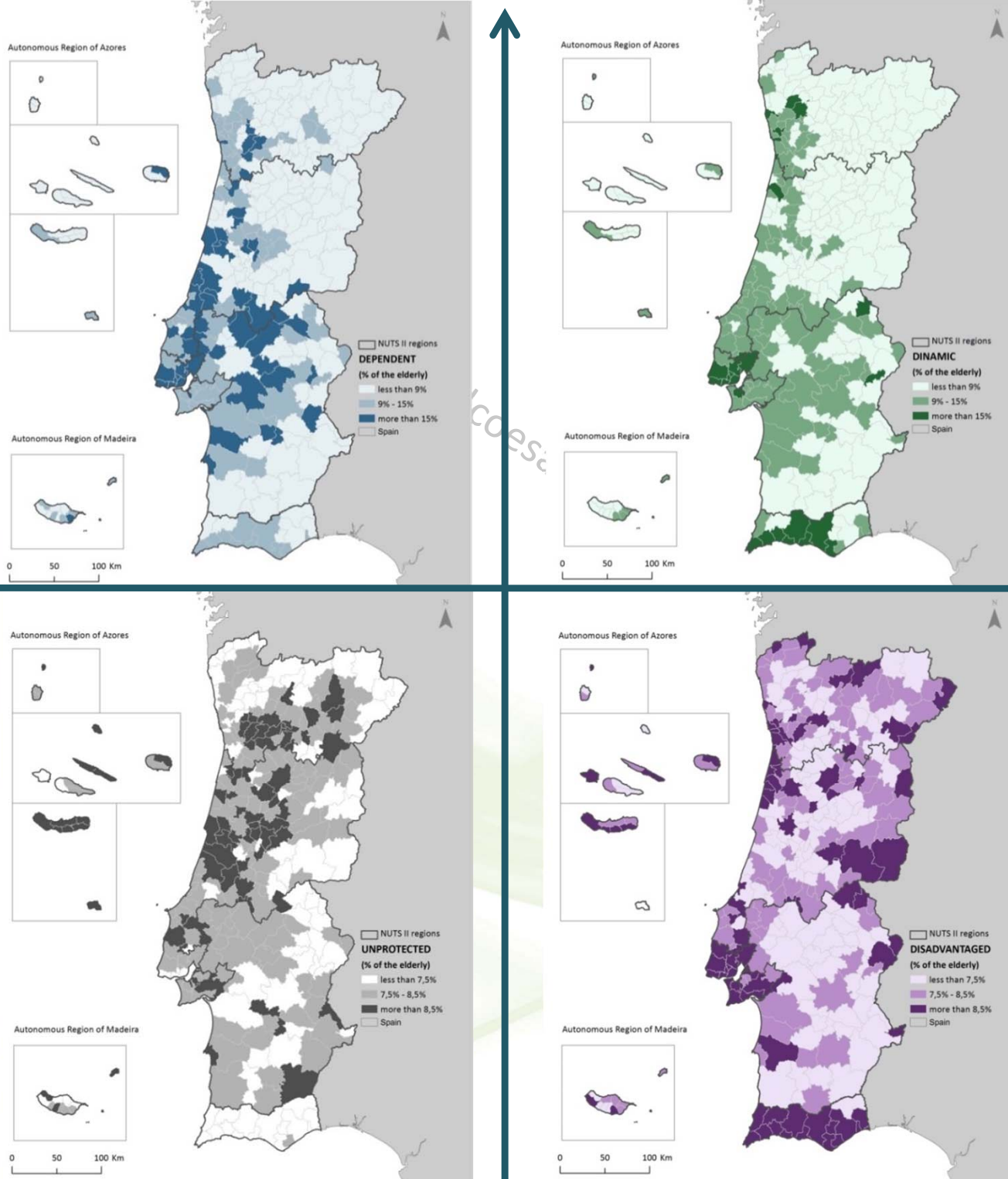


3.2 Characterizing the elderly based on different indicators

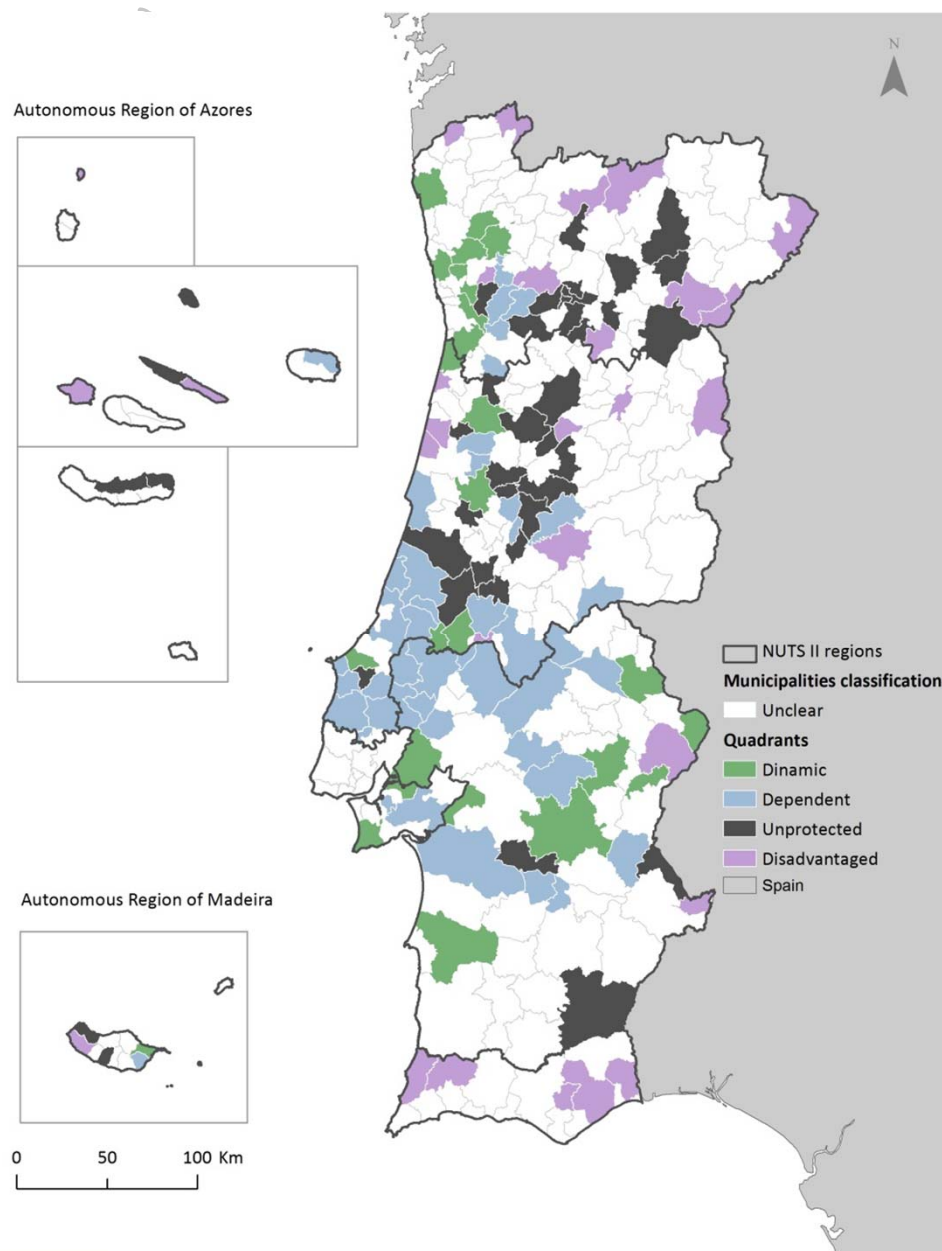
Quadrants indicators

Legend: The incidence for each profile type – the darker the higher the % of elderly classified in that profile-type

It should be highlighted that: **metropolitan areas and the Algarve contain major contrasts:** from the point of view of earnings and autonomy, the prevalence of more favourable situations coexists with unfavourable positions.



Prevalence of clusters



Each municipality is colored with its highest population weights

(Last quartile of the distribution of the population weight in each profile)

Intermediate or other less clear situations where there is no prevailing profile where left blank

Closing data gaps may colour these white municipalities...

4. Challenges ahead



Strategic analysis for the elderly

- 1) Developing a monitoring scheme for policies and measures;
- 2) Supporting Portugal 2020 and Post 2020 Cohesion policy funds

Applying this analysis framework to other themes

- 1) Working age population and the labour market
- 2) Children and young people and the school
- 3) Other sectoral areas

Close data gaps - Improving quantitative characterization to face limitations

- 1) Developing a **system of national indicators** that reflects the IPOLIS pilot project
- 2) Devising a system of output and result indicators for monitoring and evaluation
- 3) Improving analysis of available information on the elderly (e.g. microdata)



CONCEPTUAL DIAGRAM FOR THE ELDERLY

Thank you