Social exclusion in later life

An exploration of risk factors

July 2009
Acknowledgements

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This report was written by Andrea Baron, Policy Manager at Age Concern and Help the Aged, with research assistance from Eloi Ribe Montserrat.

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Executive summary

According to government statistics, 49 per cent of older people experience exclusion in at least one aspect of their life. Of this 49 per cent, 13 per cent are excluded in two or more aspects of their life and seven per cent are excluded in three or more aspects. The seven per cent that are excluded in three or more aspects of life corresponds to about 1.1 million older people.

In 2008 we published a report, called Out of Sight, Out of Mind, which examined the nature of social exclusion among the over 50s. In this report, we have updated the analysis to examine the persistence of social exclusion over time and to explore associations between social exclusion and a range of other factors such as depression.

Findings

The key findings that stem from the report are:

- **Social exclusion tends to persist over time:** six out of 10 older people who were severely excluded in 2002 continued to be severely excluded in 2006.

- **The risk of becoming socially excluded is not evenly shared across the general population:**
  - The **oldest old** are more vulnerable to social exclusion than the young old, particularly for **women**.
  - Older people from routine or manual **occupational backgrounds** experience higher rates of exclusion than those who have higher occupational status.
  - Older people who are **single and have never been married** are more vulnerable to social exclusion than those who have been married.
  - **Widowed and divorced** older people are less excluded than those who are single and never married but still experience exclusion levels three times higher than those who are married.
  - Older **ethnic minorities** experience higher levels of exclusion than older white people.
  - Older people who live in areas of high **population density** experience higher rates of exclusion than those who live in areas of low population density.
■ **Health status is strongly related to social exclusion, particularly among the young old:**
  – People aged 50-64 who are severely excluded are half as likely to be in good *health* as those who are not excluded at all.
  – Eight in 10 people aged 50-64 who are severely excluded have a *longstanding illness or disability*, compared to four in 10 of those who are not excluded at all.
  – People aged 50-64 who are severely excluded experience depression at seven times the rate of those who are not excluded at all.
  – People aged 50-64 who are severely excluded experience mobility problems at more than twice the rate of those who are not excluded at all.
  – People aged 50-64 who are severely excluded experience poor memory at three times the rate of those who are not excluded at all.

■ **Visual impairment and incontinence are strongly related to social exclusion, particularly among the oldest old:**
  – Three in 10 people aged 75+ who have serious *visual impairments* are severely excluded, compared to one in 10 of those without visual impairments.
  – 60 per cent of people aged 75+ who suffer from incontinence are excluded in at least one aspect of life.

■ **Social interaction is strongly related to social exclusion, particularly among the young old:**
  – The average *loneliness* score for severely excluded people aged 50-64 is more than double that of those who are not excluded at all.
  – 16.5 per cent of severely excluded people aged 50-64 do not have anyone to *confide in*, compared to 1.4 who are not excluded at all.
  – Two in 10 severely excluded people aged 50-64 are in contact with their friends and relatives less than once a month, compared to under one in 10 who are not socially excluded at all.

■ **Housing tenure is strongly related to social exclusion:**
  – Three in 10 people aged 50-64 who live in *rented accommodation* are severely excluded, compared to one in 10 home owners.
Recommendations

The research points to three key recommendations:

- Government programmes to understand the persistence of exclusion across the life cycle, and government priorities to give everyone a fair chance in life should be age proofed.

- **Risk profiling** technology should be developed to identify and target older people who are at risk of being severely excluded. Local government should utilise this technology to help tackle severe exclusion among older people in their communities.

- Local government should do more to tackle isolation and loneliness among older people by ensuring a wide range of easily accessible opportunities for them to remain active and involved in their communities, and by investing in local policies and programmes to enhance social contact.
Introduction

The experience of social exclusion is not unique to older people; it affects people of all ages. However, social exclusion is particularly acute in later life for three reasons. Firstly, it is rare that people excluded in mid-life are able to break the cycle of exclusion in later life. Secondly, the impact of key life events, such as bereavement, can lead to exclusion in later life. And, thirdly, the impact of age discrimination on both the aspirations of older people and the environment within which they operate can lead to exclusion.¹

In 2008 we published a report, called *Out of Sight, Out of Mind*,² which examined the nature and extent of social exclusion among the over 50s. The report, which was based on an analysis of the first wave of the English Longitudinal Study of Ageing (ELSA), found that a range of factors influence an older person’s chance of becoming socially excluded. These include living alone, living in rented accommodation, having health problems and living in an inner city area. It also found that the older someone is, the more likely they are to become socially excluded in multiple aspects of life.

In 2009, we repeated this analysis, using ELSA wave 3 data, to examine the persistence of social exclusion over time and to explore associations between social exclusion and a range of other factors such as depression.

What is social exclusion?

Social exclusion is policymakers’ jargon for being cut off from the mainstream of society. It means being unable to access things in life that most people take for granted, such as a properly equipped, well maintained home, close friends and regular company, stimulating activity and easy access to important services like GPs, shops and post offices.

The Social Exclusion Task Force (SETF), based in the Cabinet Office, defines social exclusion as a ‘shorthand term for what can happen when people or areas have a combination of linked problems such as unemployment, discrimination, poor skills, low incomes, poor housing, high crime and family breakdown.’³
Is social exclusion among older people a government priority?

In our last report, *Out of Sight, Out of Mind*, we said that little had been done to tackle social exclusion among older people. Over one year on, this is unfortunately still the case.

The Social Exclusion Taskforce has strayed into the 50+ territory with its report on rural social exclusion and older people. However, its main focus is still on tackling social exclusion among children, families and young people. *The UK National Action Plan on Social Inclusion*, published by the Department for Work and Pensions (DWP) last autumn as part of EU-wide efforts to improve social inclusion, has a strong focus on work-related issues and people under state pension age. And the government’s Public Service Agreement (PSA) on social exclusion ignores older people, which means that the needs of excluded older people will not be a priority in allocating resources and drawing up Local Area Agreements (LAAs). One ray of light could potentially be in the forthcoming Ageing Strategy but given the current economic climate it is unlikely to bring any additional resources with it.

We understand why the government has decided to focus on the most excluded adults, particularly in the context of breaking the intergenerational cycle of social exclusion. However, this should not mean ignoring the needs of severely excluded older people, especially in light of the new evidence highlighted in this report.
About the research

For this research Age Concern and Help the Aged commissioned Dr Panayotes Demakakos of University College London (UCL) to analyse data from the English Longitudinal Study on Ageing (ELSA). ELSA is a recently established survey designed to track the ageing process from the age of 50, with data collected in 2002, 2004 and 2006. Most of the statistics in this report use data from the survey’s third wave of data collection. All statistics are for England only.

Measuring social exclusion

The statistics in this report use an existing definition of social exclusion developed for a study commissioned by the government and published as The Social Exclusion of Older People: evidence from the first wave of the English Longitudinal Study of Ageing (ELSA) – Final Report (Social Exclusion Unit, Office of the Deputy Prime Minister, 2006). In that study, people were classed as either excluded, or not excluded, around seven dimensions of life. For each dimension, exclusion was defined to include around 10 per cent of over 50s.

The seven dimensions chosen were: social relationships; cultural and leisure activities; civic participation; neighbourhood life; access to financial products; access to public services and amenities; and possession of consumer durables. These measures are proxies for exclusion, based on the availability of data. Other important dimensions of exclusion, for example relating to the use of information technology, were not included in the study.

In this report, we look at the characteristics of people aged over 50 who are severely excluded, defined as people who are excluded across two or more of six of the dimensions used in the government report on social exclusion. Six, rather than seven, dimensions of exclusion could be analysed in this report because of differences in data collection between the two waves. Wave 3 did not collect information on access to public services and amenities. Therefore our 2008 and 2009 reports on social exclusion are not directly comparable. A re-analysis of the first wave, using only six dimensions, was undertaken so that the persistence of exclusion over time could be assessed. Comparisons have also been made to the group of over 50s who are not excluded across any of the dimensions (described as showing no signs of exclusion at all).
The persistence of social exclusion over time

Our research reveals that social exclusion among older people is not a transient problem but one that tends to persist over time. As Graph 1 indicates, the majority (63.3 per cent) of older people who were excluded in at least three aspects of life in 2002 continued to be excluded in at least two aspects of life in 2006. Over one third of older people who were excluded in 2002 in three or more aspects of life continued to be excluded in three or more aspects of life in 2006, while about another third who were excluded in three or more aspects of life continued to be excluded in two aspects in 2006. Only one in 10 older people who were excluded in three or more aspects of life in 2002 managed to completely escape from social exclusion in 2006. Similarly, most of those who were not excluded at all in 2002 remained not excluded in 2006.

**Graph 1: Persistence of social exclusion over time**

![Graph showing the persistence of social exclusion over time](image)
Severe social exclusion is most persistent for the young old (people aged 50-64) and the oldest old (people aged 75+). Around six in 10 people aged 50-64 and six in 10 people aged 75+ (62.5 per cent and 64.7 per cent, respectively) who were excluded in three or more aspects of life in 2002 remained so in 2006. This compares to about five in 10 people (49.6 per cent) in the intermediate age category (people aged 65-74).
Risks of becoming socially excluded

According to a government report, 49 per cent of older people experience exclusion in at least one aspect of their life. Of this 49 per cent, 13 per cent are excluded in two aspects of their life and seven per cent are excluded in three or more aspects. In this report, we look at severely excluded older people, defined in terms of being excluded in two or more aspects of life.

The risk of becoming socially excluded is not evenly shared across the general population. Our research indicates that a range of factors are strongly related to severe exclusion. This section examines these relationships in more detail.

Age and gender

Our research indicates that the oldest old – those aged 75+ – are more vulnerable to severe exclusion than the younger old. Women aged 75+, in particular, tend to be more vulnerable to severe exclusion than men. As Graph 2 indicates, nearly two in 10 (18.8 per cent) women aged 75+ are excluded in at least two aspects of life. This compares to one in 10 (12.6 per cent) women aged 50-64 and one in 10 (10.3 per cent) women aged 65-74. Only half of women aged 75+ are not socially excluded at all.

Graph 2: Social exclusion by age and gender
Occupational status

Older people who have routine and manual occupations report higher rates of social exclusion than those who have managerial and professional occupations (see Graph 3). The differences are most marked in the 50-64 and 65-74 age groups. Only three per cent of people aged 65-74 who have managerial and professional occupations are excluded in two or more aspects of life, compared to 11.7 per cent of people of the same age who have routine and manual occupations. Differences in the rates of exclusion between occupational class for the 75+ age group are still present but smaller than for the other age groups: 9.7 per cent of those who have managerial and professional occupations are excluded in at least two aspects of life compared to 14.8 per cent of those who have routine and manual occupations.

Graph 3: Social exclusion by age and occupational status
Marital status

Older people who have never been married are much more vulnerable to social exclusion than those who have been married or are widows (see Graph 4). Nearly four in 10 (37.7 per cent) are excluded in at least two aspects of life. Widowed and divorced people are less excluded than those who are single and never married but still experience exclusion levels three times higher than those who are married.

Graph 4: Social exclusion by marital status

Again those aged 75+ are most affected. More than half (53.9 per cent) of people aged 75+ who have never been married are excluded in at least two aspects of life. Living alone, particularly for men, appears to be a risk factor. About one in 10 (8.7 per cent) men aged 75+ who do not live alone are excluded in at least two aspects of life compared to three in 10 (29.8 per cent) of those who live alone.
Ethnicity

Older ethnic minorities experience higher levels of social exclusion than older white people (see Graph 5). Nearly a quarter (24.3 per cent) of ethnic minorities are excluded in two or more aspects of life, compared to about one in 10 (12.2 per cent) white people. Thus, older ethnic minorities experience severe exclusion at twice the rate of older white people.

Graph 5: social exclusion by ethnicity

Population density

Older urban dwellers tend to experience higher rates of social exclusion than older people who live in the least densely populated areas of England (see Graph 6). In the 50-64 age group, those who live in densely populated areas experience nearly three times the rate of social exclusion of those who live in the least densely populated areas. In the 65-74 age group, those who live in more densely populated areas experience twice the rate of social exclusion of those who live in the least densely populated areas. And in the 75+ age group, those who live in more densely populated areas experience two and a half times the rate of social exclusion of those who live in the least densely populated areas. Nearly two in 10 (19.6 per cent) older people who live in London experience exclusion in two or more aspects of life. These differences in social exclusion by population density most probably indicate that social exclusion is a more intense problem for older people who live in inner city areas than for those who live in rural settings.
Graph 6: Social exclusion by age and population density

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Not excluded at all</th>
<th>Excluded in one dimension</th>
<th>Excluded in two or more dimensions</th>
</tr>
</thead>
<tbody>
<tr>
<td>50 to 64 years old</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>65 to 75 years old</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>75 years or older</td>
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</tr>
</tbody>
</table>

- Least dense
- Most dense
Health and social exclusion

Both life expectancy and healthy life expectancy (the number of years of good health or fairly good self-perceived health) have increased over recent years, but healthy life expectancy has increased at a slower rate. Poor health is strongly related to severe exclusion among older people. This section examines the relationship in more detail.

Self-perceived health

Older people who report poorer self-perceived health experience higher rates of severe exclusion than those who do not (see Graph 7). The greatest difference is observed in the young old, where under four in 10 (35.3 per cent) of those excluded in three or more dimensions of life report good or very good self-perceived health, compared to eight in 10 (80.9 per cent) of those who are not excluded. Four in 10 (39.4 per cent) people aged 75+ who report good or very good self-perceived health, do not consider themselves to be excluded at all.

**Graph 7: Fair or poor self-perceived health by social exclusion and age**
Longstanding illness or disability

Older people who have a longstanding illness or disability tend to experience higher rates of severe exclusion than those who do not (see Graph 8). The greatest difference is observed in the young old, where nearly eight in 10 (76.1 per cent) of those excluded in three or more aspects of life have at least one longstanding illness or disability, compared to more than four in 10 (44.1 per cent) of those who are not excluded at all.

**Graph 8: Self-reported longstanding illness or disability by social exclusion and age**
Depression

The more socially excluded a person is, the more likely he or she is to suffer from depression. Graph 9 indicates that this relationship is particularly strong among the young old. Under one in 10 people (7.8 per cent) aged 50-64 who are not socially excluded are depressed. By contrast over five in 10 (54.4 per cent) who are excluded in three or more aspects of life are depressed. Therefore, people aged 50-64 who are excluded in three or more aspects of life experience depression at seven times the rate of those not excluded at all.

Graph 9: Depression by age and social exclusion

For the 65-74 age group, depression is strongly related to social exclusion but the association is not as strong as for the younger old. Under one in 10 people (8.5 per cent) aged 65-74 who are not socially excluded are depressed. By contrast over four in 10 (45.3 per cent) who are excluded in three or more aspects of life are depressed. Thus, people aged 65-74 who are excluded in three or more aspects of life suffer depression at about five times the rate of those not excluded at all.

For the 75+ age group, depression is also related to social exclusion. About one in 10 people (12.8 per cent) aged 75+ who are not socially excluded are depressed. By contrast nearly three in 10 (32.1 per cent) who are excluded in three or more aspects of life are depressed. Thus, people aged 75+ who are excluded in three or more aspects of life suffer depression at about two and a half times the rate of those not excluded at all.

People with mobility problems, visual impairment, arthritis and incontinence are more at risk of feeling depressed, as are recently bereaved people, those who live in urban areas and those who live without a spouse/partner.

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1 This section measures self-reported depressive symptoms but not clinical depression. The term depression here is used to describe cases of elevated depressive symptoms that are possibly (but not necessarily) cases of clinical depression.
Mobility

Older people who have mobility problems experience higher rates of severe exclusion than those who do not (see Graph 10). Nearly two in 10 (17.3 per cent) people with mobility problems aged 50-64 experience exclusion in two or more aspects of life, compared to under one in 10 (7.6 per cent) of those who do not. The respective figures for those aged 65-74 are 11.4 per cent and 8.4 per cent, and for those aged 75+ are 16.7 per cent and 15.2 per cent.

**Graph 10: Social exclusion by mobility limitation and age**
Memory

Older people who have poor memory experience higher rates of severe exclusion than those who do not (see Graph 11). The greatest difference is observed in the young old, where nearly one quarter (23.7 per cent) of those with poor memory experience exclusion in two or more aspects of life, compared to under one in 10 (7.7 per cent) of those with best memory. Therefore, those with poor memory have three times the chance of becoming severely excluded than those with best memory.

Graph 11: Social exclusion by age and memory
Visual impairment

Older people who have visual impairments experience higher rates of severe exclusion than those who do not (see Graph 12). The greatest difference is observed in the oldest age group, where three in 10 (29.8 per cent) of those with serious visual impairments (both short and long vision impaired) experience exclusion in two or more aspects of life, compared to about one in 10 (13.9 per cent) of those without.

Graph 12: Social exclusion by visual impairment and age
Incontinence

Older people who suffer from incontinence experience higher rates of severe exclusion than those who do not (see Graph 13). The greatest association is observed in the oldest age group, where only four in 10 (40 per cent) who suffer from a persisting incontinence problem do not experience exclusion at all.

**Graph 13: Social exclusion by incontinence and age**

![Graph showing social exclusion by incontinence and age](image-url)
Social relationships and social exclusion

Just over one million older people (11 per cent) in England always or often feel lonely. This section examines the association between loneliness, social relationships and social exclusion.

Loneliness

There is a strong relationship between severe exclusion and feeling lonely (see Graph 14). The lonelier a person is the more excluded they are in their life. The relationship is most pronounced for the young old. The average loneliness score for people aged 50-64 who are excluded in three or more aspects of life is more than double that of those who are not excluded at all. People with mobility problems, sensory impairment and memory problems are more at risk of feeling lonely, as are recently bereaved people and those who live in urban areas.

Graph 14: Mean score of loneliness by social exclusion

In order to avoid circular arguments, the social exclusion measure used does not contain exclusion from social relationships.
Number of confidants

Older people with fewer confidants are more excluded. This relationship is strongest for the young old, but still present in the two older age groups. Nearly two in 10 (16.5 per cent) people aged 50-64 who are excluded in at least three aspects of life do not have any confidants, compared to a minority (1.4 per cent) who are not excluded at all. Some 6.8 per cent of people aged 65-74 who are excluded in at least two aspects of life do not have any confidants, compared to 1.9 per cent who are not excluded at all. And some 7.4 per cent of people aged 75+ who are excluded in at least three aspects of life do not have any confidants, compared to 2.3 per cent who are not excluded at all.

As Graph 15 indicates, 94.8 per cent of people aged 75+ who are not excluded at all have at least two confidants, compared to 80.2 per cent of those who are excluded in three or more aspects of life. Older people who have never been married are much more at risk of having no confidants.

Graph 15: Having two or more confidants by social exclusion and age
Frequency of contact with others

The less frequently older people have contact with friends and relatives that do not live with them, the more socially excluded they are. Again, the relationship is strongest in the young old. As Graph 16 indicates, two in 10 (19.9 per cent) people aged 50-64 who are excluded in at least three aspects of life contact their friends or relatives less than once a month, compared to under one in 10 (6.8 per cent) of those who are not socially excluded at all.

**Graph 16: Frequency of contact with friends and relatives (less often than once/twice a month) by social exclusion and age**

Overall, the oldest old tend to have higher contact with friends and family than the younger old. This may reflect the increasing needs of older people for care over the age of 75. Older people who have never been married are more at risk of having less frequent contact with friends and family.
Social support

The more excluded an older person is the less support they receive from their partner and friends, which indicates that the quality of older people’s relationships is related to social exclusion. Graph 17 shows that the average score of social support from a partner for older people excluded in at least three aspects of life is 6.7 compared to a score of 8.1 for older people who are not socially excluded at all.

**Graph 17: Mean score of social support from partner by social exclusion**

![Bar chart showing mean score of social support from partner by social exclusion.](image)
Graph 18 shows that the average score of social support from friends for older people excluded in at least three aspects of life is 5.7 compared to a score of 6.7 for older people who are not socially excluded at all.

**Graph 18: Mean score of social support from friends by social exclusion**

![Bar chart showing mean score of social support from friends by social exclusion](chart.png)
Housing and social exclusion

Housing is widely recognized as key to health and well-being. In the UK most people aged over 50 are owner occupiers. Some 78 per cent of people aged 45-64 are owner occupiers, while 76 per cent of people aged 65-74 and 70 per cent of people aged 75 plus are owner occupiers. This section examines the relationship between housing tenure and social exclusion.

Home ownership

Graph 19 indicates that people who live in rented accommodation experience higher levels of social exclusion than home owners. One in four (25.4 per cent) people aged 50-64 who live in rented accommodation report being excluded in two or more aspects of life. This compares to about one in 5 (6.8 per cent) of home owners. The pattern is similar for people aged 65-74. Social exclusion rates increase for home owners and tenants who are aged 75+ but not for those with a mortgage. Home owners aged 75+ experience exclusion in at least two aspects of life at twice the rate of their counterparts aged 64-75.

Graph 19: Social exclusion by home ownership and age

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Graph 19: Social exclusion by home ownership and age

- Not excluded at all
- Excluded in one dimension
- Excluded in two or more dimensions

50 to 64 years old
65 to 75 years old
75 years old or older

- Own home outright
- Buying home with the help of a mortgage or loan
- Rent home or pay part rent and part mortgage (shared ownership)
Older people who rent their accommodation also report higher rates of ill-health than those who own their home.

Many older people live in non-decent housing. Some 2.1 million households in England with at least one person aged over 60 are living in a non-decent home. This includes 900,000 households with someone over 75.\(^7\) The more housing problems an individual has the worse their perceived health. Similarly, the more housing problems a person has the more likely they are to suffer from a longstanding illness or disability or depression. In the 50-64 age group, five in 10 (45.1 per cent) of those without any accommodation problems report suffering from a longstanding illness or disability, compared to six in 10 (61.4 per cent) of those with three or more housing problems. For the 65-74 age group, six in 10 (56.4 per cent) of those without any accommodation problems report suffering from a longstanding illness or disability, compared to eight in 10 (77.5 per cent) of those with three or more housing problems.
Recommendations

This research points to three key recommendations. Firstly, more should be done to tackle social exclusion in old age. The findings indicate that exclusion persists over time and that the chances of escaping from it are low for people aged over 50. Thus, unless government reaches out to disadvantaged older people the majority will be sentenced to a life of exclusion. The government has programmes to understand the persistence of exclusion across the life cycle and has set priorities to give everyone a fair chance in life. However, these programmes and priorities do not necessarily cover the whole life course. These ‘lifetime’ approaches to tackling social exclusion should mean just that, and should include later life as a matter of course.

Secondly, the research indicates that several factors are associated with increased risk of being severely excluded. These include:

- being aged 75+
- having low occupational status
- being single and having never married
- being widowed or divorced
- belonging to an ethnic minority group
- living in an urban area
- having poor health
- living in rented accommodation; and
- living without a spouse/partner.

Further exploration of the associations between social exclusion and a range of factors should be undertaken, with the aim of developing high quality data about older people who are at risk of being severely excluded. These data should be used to develop robust risk profiling techniques to identify and target older people who are at risk of being severely excluded. Local government and other partners should utilise this risk profiling technology to help tackle severe exclusion among older people in their communities.

Risk profiling measures whether people are at risk of being socially excluded by analysing multiple data sources. It is increasingly being used by a range of organisations. For example, the Jobcentre Plus Geographical Information System (GIS) combines background socio-economic data, census information and transport facilities to identify concentrations of exclusion. The purpose of the technique is to ensure that interventions are targeted at those with the greatest need, thereby ensuring that services deliver for all.
Thirdly, the research indicates that loneliness is strongly related to severe exclusion. More needs to be done to tackle isolation and loneliness in old age, which can be precipitated by a range of events such as leaving work, health decline and bereavement. Older people should have a wide range of easily accessible opportunities to remain active and involved in their communities, whether through work, volunteering, taking part in classes to learn new activities or intergenerational programmes. And there should be more investment in local policies and programmes, such as befriending schemes and peer-to-peer telephone clubs, to enhance social contact.
References


6 Department for Communities and Local Government, Housing in England 2006-07, © Crown Copyright 2006, table 1.3.


8 For example, see: http://www.cabinetoffice.gov.uk/social_exclusion_task_force/context.aspx [accessed 27 April 2009].
Age Concern England (charity number 26794) has merged with Help the Aged (charity number 272786) to form Age UK, a charitable company limited by guarantee and registered in England: registered office address 207–221 Pentonville Road, London, N1 9UZ, company number 6925798, registered charity number 1128267. Age Concern and Help the Aged are brands of Age UK. The three national Age Concerns in Scotland, Northern Ireland and Wales have also merged with Help the Aged in these nations to form three registered charities: Age Scotland, Age NI, Age Cymru.